OnTime

User Guide

Your reference guide for getting the most out of OnTime

February 2015 Edition

Copyright Information

Technical Support Options

Product Name:	OnTime
OEM distributed:	If the product came installed with a computer or device or bundled with another software application, the hardware manufacturer or software vendor provides technical support and assistance for this software. Please contact the manufacturer directly for support.
Support Info Online:	http://www.ontime360.com/Support.aspx
OnTime Subscriptions:	Product support may be included with your Vesigo Studios OnTime subscription. Please visit http://www.ontime360.com/Support.aspx for details.
Conditions:	Vesigo Studios support services are subject to then-current prices, terms, and conditions, which are subject to change without notice.

Professional Support Options

Support Option	Benefits of Service
Self-Support **For self-help tools and content specific to OnTime, visit http://www.ontime360.com/Support.aspx**	• Knowledge Base articles • FAQs • Support Webcasts • Many other online resources
OnTime System Community **Visit the OnTime community center to communicate online with others about OnTime applications at http://help.ontime360.com/**	Information provided on: • Deploying • Installing • Managing • Troubleshooting • Real world experience
Incident-based support **Assisted Support from Vesigo Studios for break/fix solutions** **Submit your incident online at http://www.ontime360.com/Support.aspx** **Phone support: 541-326-4200**	• Issues that cannot be resolved in the community forums • Business critical support issues • Quick fix needs

OnTime Advisory Services **Short-term and proactive assistance for specific design, development, or deployment issues via phone.** **(866) 848-5919**	• Installation and configuration services • Deployment and migration services • Performance optimization services • Proactive fault-tolerance planning services

Table of Contents

Welcome to OnTime

Welcome to OnTime, the comprehensive suite of logistics tools for shippers and carriers. This user manual covers OnTime's individual applications and offers an overview of how all of those applications work together to unify OnTime supported businesses.

Applications covered include:

- OnTime Management Suite
- OnTime Dispatch
- OnTime Customer Web Portal
- OnTime Mobile Web
- OnTime Mobile for Windows Mobile
- OnTime Mobile for Android
- OnTime Mobile for Windows Phone
- OnTime Mobile for Blackberry
- OnTime Mobile WAP Edition

Customer Feedback is Valuable

At Vesigo Studios, we believe that the success of OnTime is directly related to the success of our customers and we appreciate feedback from our customers. If a problem with OnTime arises, let us know and we will work to resolve the issue. If OnTime could work more efficiently, please convey any suggestions and we will consider implementing them. If a new feature for OnTime is imagined, we would be happy to consider adding it.

OnTime customers can submit feedback at any time through our website. Visit http://www.ontime360.com/Support.aspx for a list of the ways to contact us. Every bit of feedback that we receive is cataloged for consideration. Approved suggestions may be implemented into a future version of OnTime.

Finding the Necessary Information

OnTime on the Web

The OnTime website offers product tours, sample modules, tutorials, tips and tricks, and in-depth articles about using OnTime. Information regarding software updates, new components, and service releases is also available on the website. Answers to frequently asked questions (FAQs), Knowledge Base articles, and other support information are on this site.

To connect to the website from within OnTime, point to the **Help** tab and click **OnTime Web Site**. The OnTime website can be found at http://www.ontime360.com/

Online Help in the OnTime Applications

In *OnTime Dispatch* and *OnTime Management Suite* click on the help button located in the upper right-hand corner of the application.

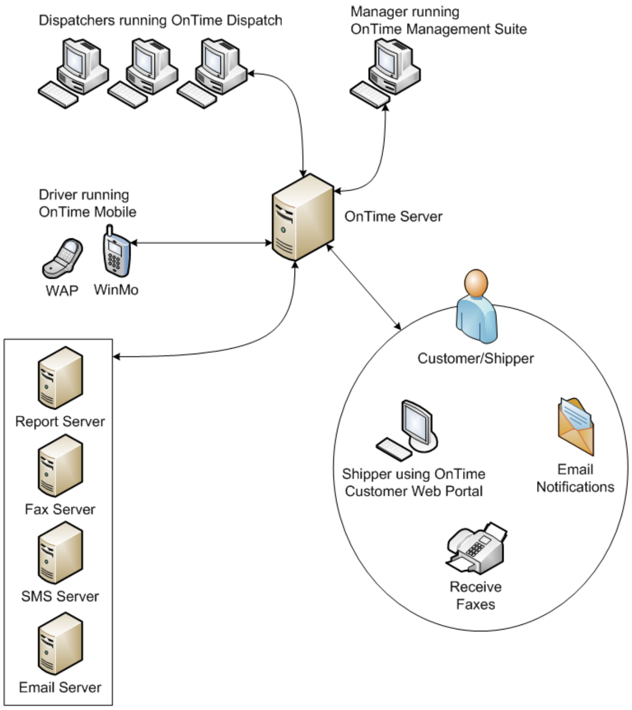
Understand Text Conventions in the *OnTime User's Guide*

The *OnTime User's Guide* covers the fundamentals of OnTime, focusing on business scenarios that are expected to be encountered most often. The guide uses several conventions to help to identify information:

Text Types	Where	Type of Information
CAPITALS	Anywhere	Keyboard keys
Bold text	In the text	Elements on your screen
Italic text	In the text	Glossary terms, book titles, path names, note text
Bold italic text	Beneath figures or in the margins	Glossary terms

Overview of OnTime

OnTime greatly reduces operating expenses and overhead by centralizing data processing and storage at our secured data center, eliminating the expense and headache normally incur when operating networks, servers, and I.T. staff. With the proliferation of high speed internet connections and proprietary technologies in OnTime, the power and features of a system that traditionally costs thousands of dollars each month is available for only a couple hundred. This shift in business technology is often referred to as cloud computing; OnTime was the first to bring cloud computing to the industry.



OnTime stores all data on the user's local computer; however, the data is also synchronized to a secured set of servers in OnTime's data center. Information stored on OnTime's servers may be synchronized with other computers within the user's business. This feature allows multiple users to access the same information in OnTime from the office or from home. Because all applications in OnTime synchronize with the same database, everyone will see the same information at approximately the same time.

Vesigo Studios, the makers of OnTime, take care to back up the data stored on the servers and strive to keep a 99.99% network uptime across all services. These precautions ensure that data is protected and accessible to users at all times.

Dates and Time in OnTime

Dates and times displayed in OnTime are translated into the user's local time zone based on both OnTime account settings and Windows Operating System settings. Be sure to set your local time zone – OnTime stores dates and times in Universal Coordinated Time to ensure accuracy across time zones and over time.

Security

Data connections to and from the server can be optionally enabled with 128 bit SSL encryption.

All data on the Windows Mobile device and desktop are stored in encrypted databases. WAP enabled devices are automatically logged out after a configurable period of time to ensure protection even if a driver loses his phone.

Three-tier architecture on the server and across the software prevents data from being exposed to hackers on the internet. The *OnTime Customer Web Portal* is protected with multiple layers of security between services to reduce surface area attacks on the site.

For more information about OnTime's security, please contact technical support at (541) 326-4200 or clientservices@ontimesystem.com.

Working Online and Offline

OnTime's Smart Client Technology combines the productivity and performance of desktop applications with the real time connectivity of the Internet. The OnTime Dispatch and Management tools are applications that automatically exchange real-time data over the Internet to other users, partners and customers. If connection to the Internet is temporarily lost, OnTime's Smart Client will default to offline mode. Real-time updates may be lost for a short time; however, many of OnTime's functions will still be accessible.

Before Beginning

The *Before Beginning* section will help with successful installation and setup of OnTime Identify the computers that OnTime will be operated from.

Note: No extra charge is incurred for installing OnTime software to additional machines including home, office, and portable computers.

System Requirements

Ensure that each machine OnTime will be installed on meets the system requirements outlined below.

OnTime Management Suite and OnTime Dispatch

- A PC running Windows XP with Service Pack 3 or later (32-bit or 64-bit)
- 1 gigabyte (GB) available memory
- 2 gigabytes (GB) available disk space
- VGA display at 1024 x 768 resolution or higher
- Microsoft Mouse or compatible pointing device

OnTime Mobile for Windows Mobile

- Windows Mobile 2003, 2003 SE, 5, 6
- Internet connection for real-time data access
- 5 MB free space on device or storage card. Additional space required for company data (typically 500kb to 2mb).
- Touch screen for digital signature capture
- Barcode reader for automated scanning

OnTime Mobile for BlackBerry

- A BlackBerry device running BlackBerry OS 5 or higher

OnTime Mobile for Android

- An Android device running Android OS version 1 or higher
- Access to Google Play

OnTime Mobile for iOS

- An iPad, iPhone, or iPod Touch running iOS version 3.0 or higher

OnTime Mobile for Windows Phone

- A Windows Phone with access to the Market

OnTime Mobile Web

- A smartphone with a web browser capable of running JavaScript

OnTime Mobile WAP Edition

- Any WAP enabled device with a data connection
- Or any mobile device with a web browser that can access the internet

Chapter 1: Download and Install OnTime Software

Start by downloading the latest version of the appropriate application from the following web page: http://www.ontime360.com/Download.aspx

- Managers will want to download *OnTime Management Suite*
- Dispatchers will want to download *OnTime Dispatch*
- Drivers and field personnel with Windows Mobile devices and phones will want to download *OnTime Mobile for Windows Mobile*

Note: The *OnTime Management Suite* download includes both the *Management Suite* and *Dispatch* programs. *Dispatch* need not be downloaded separately if *Management Suite* has already been downloaded. *OnTime Dispatch* is made available as a separate install, if *OnTime Management Suite* should not be installed on a computer.

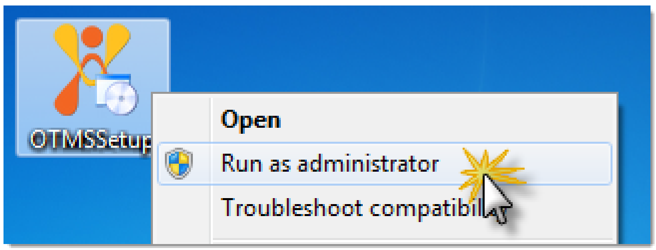
Note: *OnTime Mobile for Windows Mobile* is for Windows Mobile devices only. This program will not work on other phones or mobile operating systems. Remember that *Windows Mobile* is not the same as the newer *Windows Phone*, which requires a different application.

Note: Close all other programs and turn off virus-protection software to prevent installation conflicts

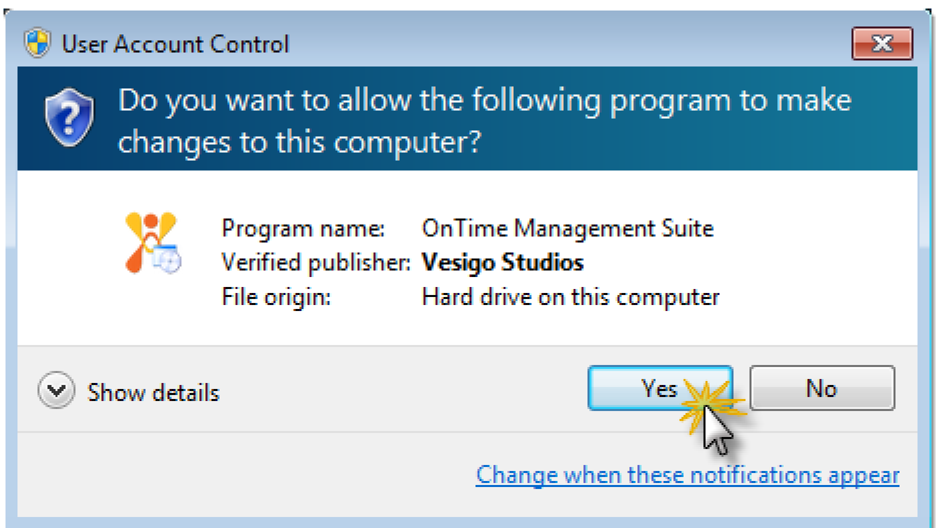
Installing on Windows Vista, Windows 7, or Windows 8

Installing OnTime software on Windows Vista, Windows 7, or Windows 8 may require administrative privileges which are sometimes blocked by User Account Control (UAC). OnTime software can be installed on Windows Vista, 7, or 8, with or without UAC turned on:

1. Download the OnTime software
2. Start the installation by right-clicking on the setup file and choosing **Run as administrator**:



3. Setup will initialize.
4. If UAC is enabled, the following prompt will appear. If it does, choose **Yes** to allow.



5. Continue setup as usual by following the onscreen prompts.

To Install OnTime Management Suite

1. Download the setup file
2. Open the setup file
3. Follow the prompts to complete the installation process
4. Once installation is complete, *OnTime Management Suite* may open automatically (based on a choice made during installation). If it does not, go to **Start** menu > **All Programs** > **OnTime System** > **OnTime Management Suite**.

A login screen will appear requesting Company ID, User Name, and Password. These are initially provided by Vesigo Studios upon setup of a new OnTime hosted account. Please refer to these credentials from Vesigo Studios when logging in for the first time. Other users must be assigned credentials by the company's OnTime Administrator from within *OnTime Management Suite*.

To Install OnTime Dispatch

1. Download the setup file.
2. Open the setup file.
3. Follow the prompts to complete the installation process.
4. Once installation is complete, *OnTime Dispatch* may open automatically (based on a choice made during installation). If it does not, go to **Start** menu > **All Programs** > **OnTime System** > **OnTime Dispatch**.

A login screen will appear requesting Company ID, User Name, and Password. Enter the appropriate credentials and proceed to use *OnTime Dispatch*.

To Install OnTime Mobile for Windows Mobile

OnTime Mobile for Windows Mobile may be installed through a computer using ActiveSync, which is usually accomplished via USB cable. Alternately, the setup program may be downloaded and installed directly on the desired mobile device.

To Install OnTime Mobile for Windows Mobile from the Desktop

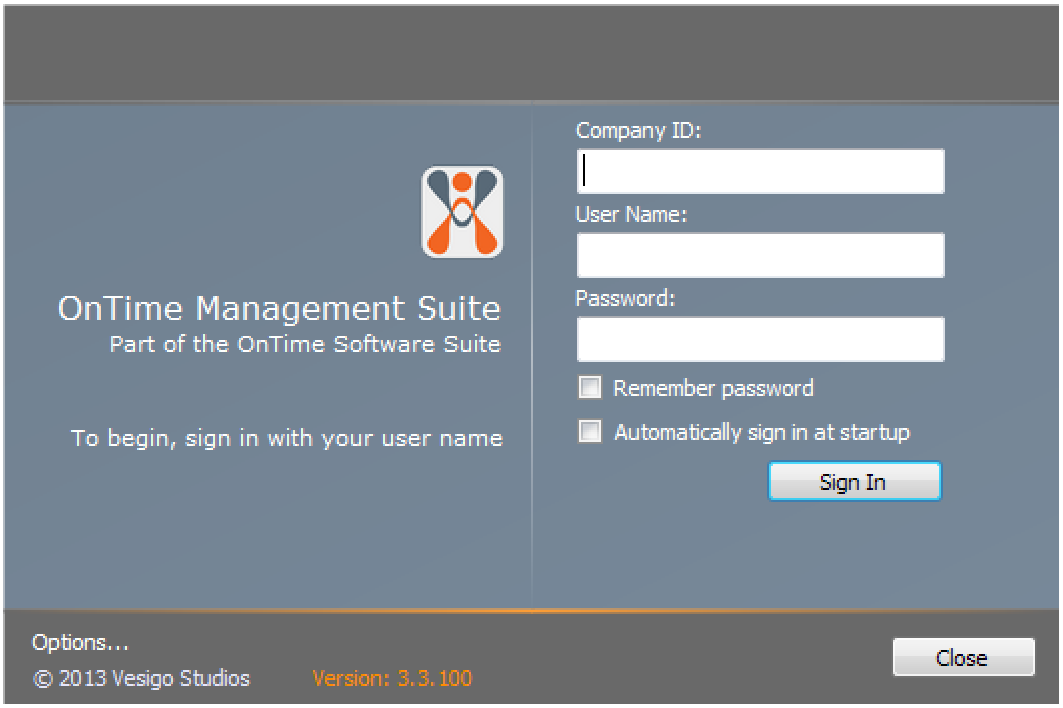
1. Connect a Windows Mobile device to a desktop computer with the appropriate sync cable
2. Download the OnTime Mobile for Windows Mobile setup file
3. Open the setup file
4. The program will begin the installation process. A dialog box will appear.
5. To save the application to a storage card, click **No** on this screen. To save the application to the device, select the desired location.
6. Click on the drop-down menu that appears to see all storage choices
7. Select the desired type of storage
8. Installation will occur. Complete any further steps required by the device.
9. Click **OK**.
10. Start *OnTime Mobile for Windows Mobile*. If it does not open automatically, go to the **Start** menu > **Programs** > **OnTime Mobile**.
11. A login screen will appear asking for a Company ID, User Name, and Password. Enter the appropriate credentials and proceed to use *OnTime Mobile*.

To Install *OnTime Mobile for Windows Mobile* Directly on the Device

1. Open a web browser on the mobile device
2. Navigate to http://ppc.ontimesystem.com
3. Tap the **Download Now** link to download the latest version of *OnTime Mobile for Windows Mobile*
4. Open the downloaded file
5. The setup program will launch. Follow the prompts to complete the installation.
6. Start *OnTime Mobile for Windows Mobile*. If it does not open automatically, go to the **Start** menu > **Programs** > **OnTime Mobile**.
7. A login screen will appear asking for a Company ID, User Name, and Password. Enter the appropriate credentials and proceed to use *OnTime Mobile*.

Chapter 2: Start OnTime for the First Time

OnTime Management Suite should be the first program run. Using this program, OnTime may be configured to meet the needs of a specific business. All of the OnTime programs will present a login screen at start up.



Example: The log in screen for OnTime Management Suite

Log in using the appropriate **Company ID**, **User Name**, and **Password**. These will be provided in an email from Vesigo Studios during the initial account set-up.

The **Remember password** option will save the credentials. We do not recommend selecting this option on a public computer because others may be able to log in to the program using the saved credentials.

The option **Automatically sign in at startup** will automatically sign in the saved user. To turn this option off and change users, go to **General Options** > **Start up**. Uncheck the option to **Automatically sign in**, save changes, and restart the program.

Three common troubleshooting tips for signing in:

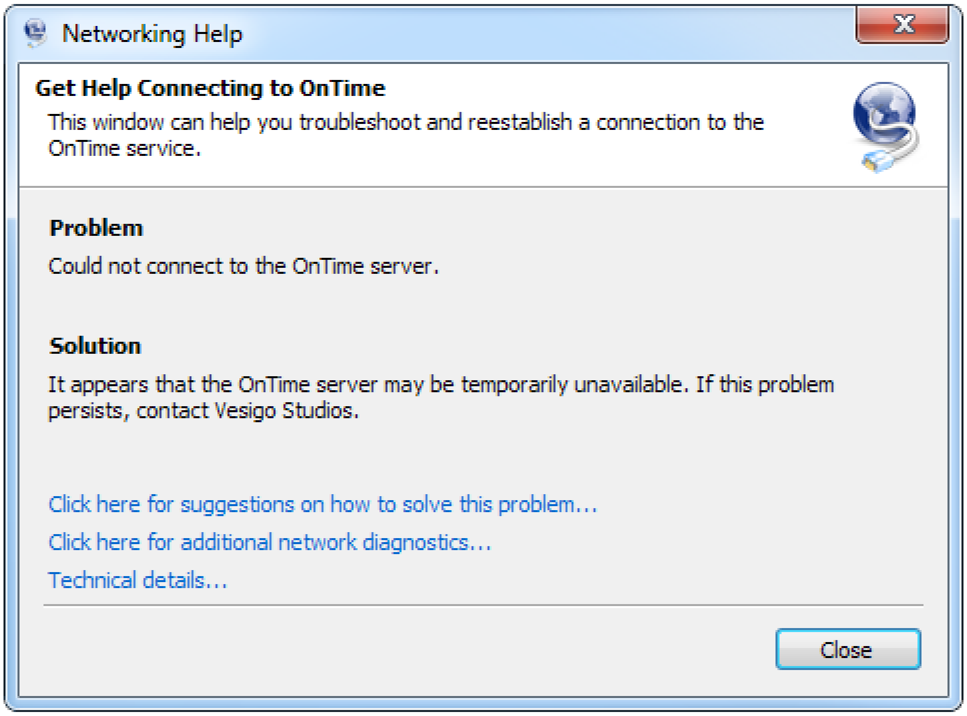
Check that the company ID, user name, and password correct. Passwords are case sensitive.

Check that the internet connection is working properly. **Tip**: Try to open a web browser and navigate to the OnTime web site at www.ontime360.com.

Check that security software or a firewall is not blocking OnTime. For more information on security issues affecting sign in, see the following section.

Configuring a Firewall

Because signing into OnTime requires logging into a web service, issues with computers' security or firewall programs may arise. Some computers have the firewall locked down very tight and will deny any program, including OnTime, the ability to communicate via the Internet. In such cases, a window such as this may appear when trying to sign in:



Most of these security programs have an easy way to "trust" a program, or allow a program to communicate with the internet. If so, enable OnTime as a trusted or allowed program. If such a setting on the firewall is unavailable, contact the security software vendor for more instructions.

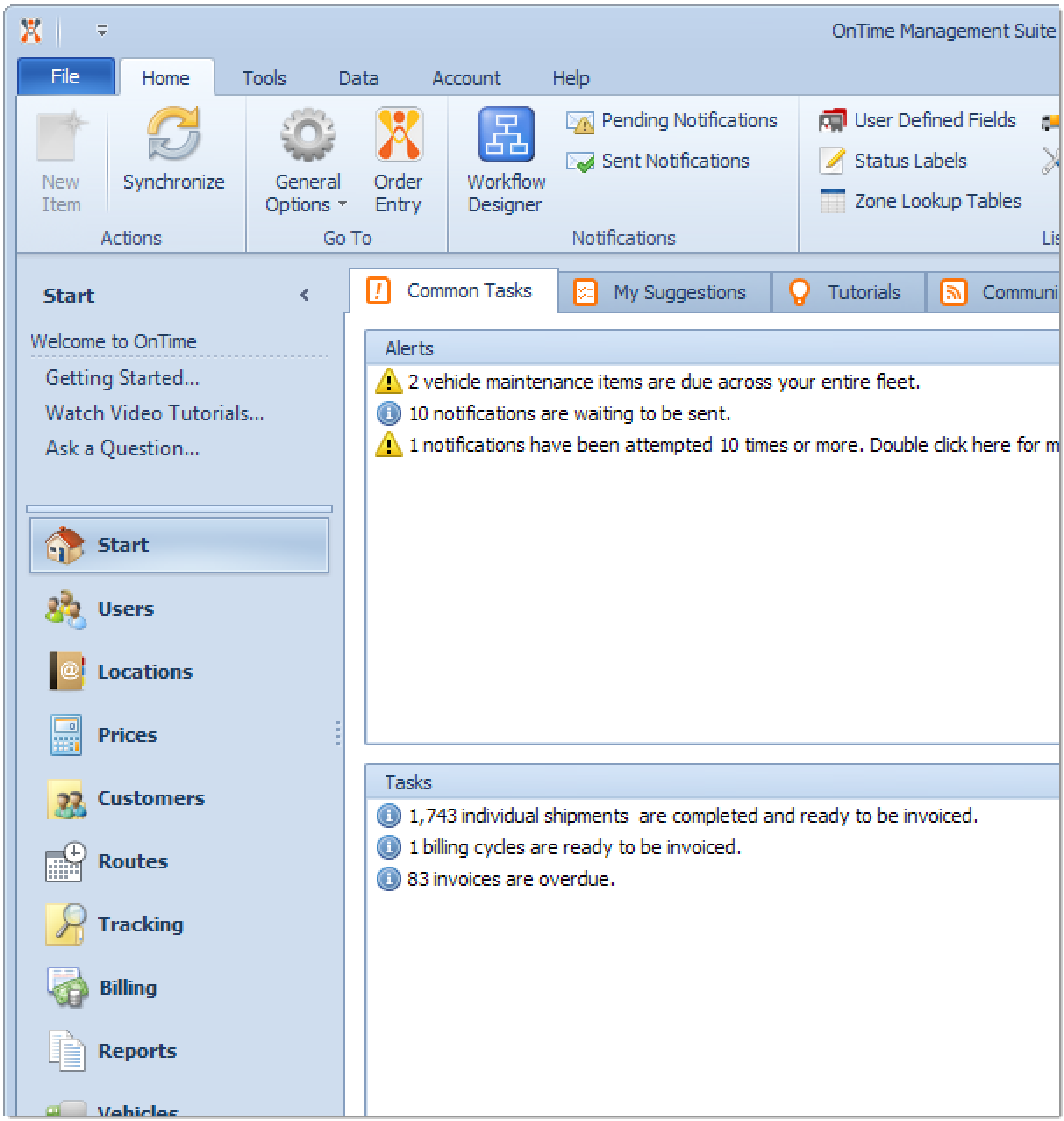
If the problem persists, try disabling all security software and firewalls temporarily to see if that resolves the problem. If after performing these steps log in is still impossible, contact OnTime Technical Support.

Technical Note: OnTime makes use of standard HTTP traffic over port 80. No special ports are required outside of port 80. If a software firewall blocks OnTime, it is probably not on the whitelist of trusted programs.

Getting Familiar with the Program Look and Feel

OnTime is designed using the same layout principles as Microsoft Office applications, which often helps new OnTime users to easily acquaint themselves with the program.

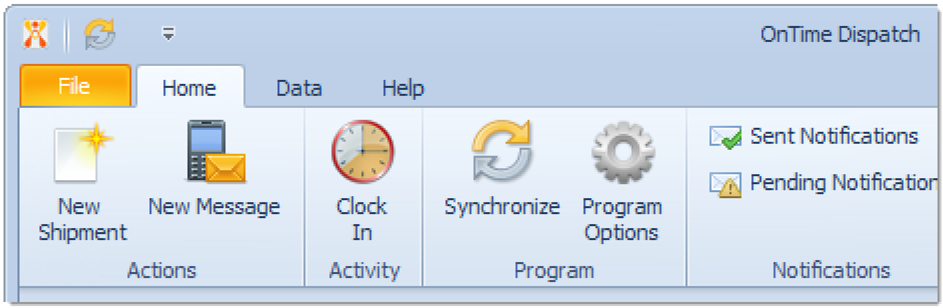
In *OnTime Management Suite* and *OnTime Dispatch*, a ribbon appears across the top, offering access to common tasks. Navigation buttons that provide access to various areas of OnTime are visible along the lower left-hand side. Clicking on one of these navigation buttons will change the view to display information pertaining to the selected section.



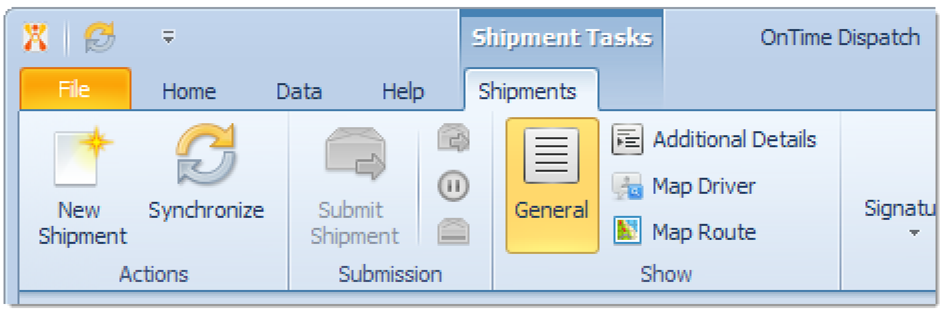
The Ribbon

The ribbon across the top is contextual (it displays only appropriate commands).

For instance, the **Home** tab is always shown, but from the order entry form an additional tab with commands related to order entry is also visible.

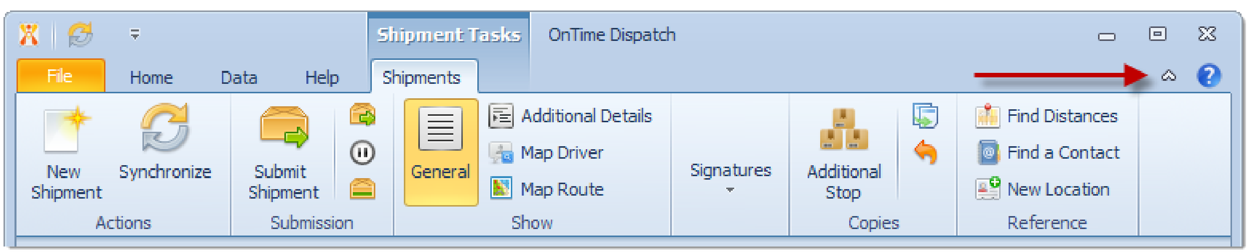


Ribbon without context



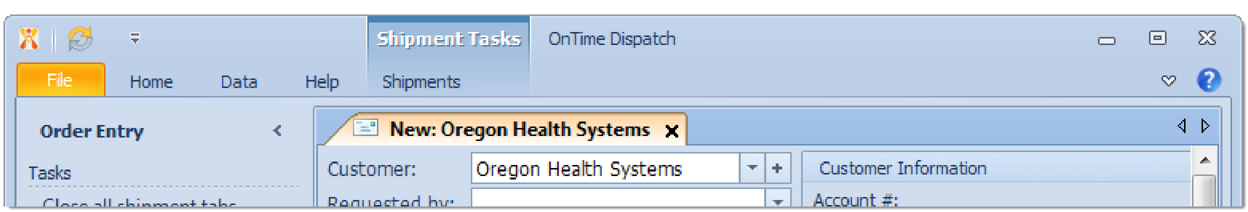
Ribbon in order entry context

Double-clicking on a tab within the ribbon will shrink that tab. The ribbon can be minimized by clicking the button on the right-hand side (see below).



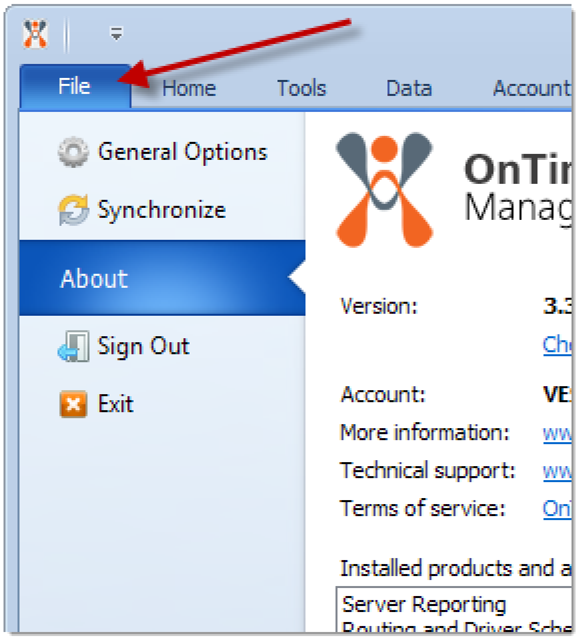
Ribbon fully visible

Commands will still be accessible by clicking on the tab, temporarily dropping the ribbon down.



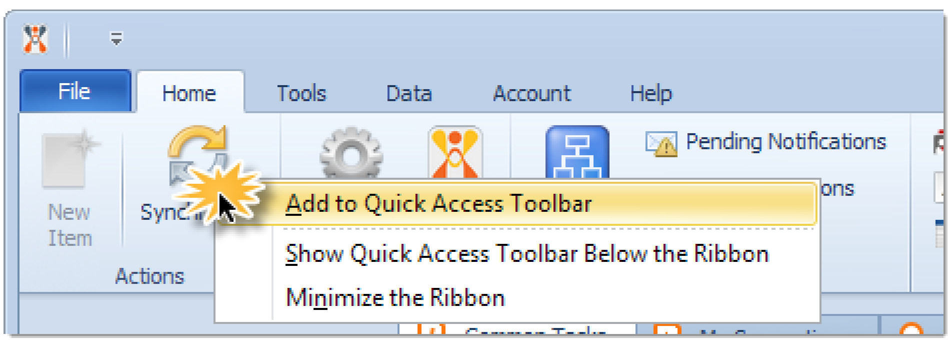
Ribbon hidden after double clicking on tab

To access the additional options and commands in the menu illustrated below, click the **File** button in the upper left-hand corner:

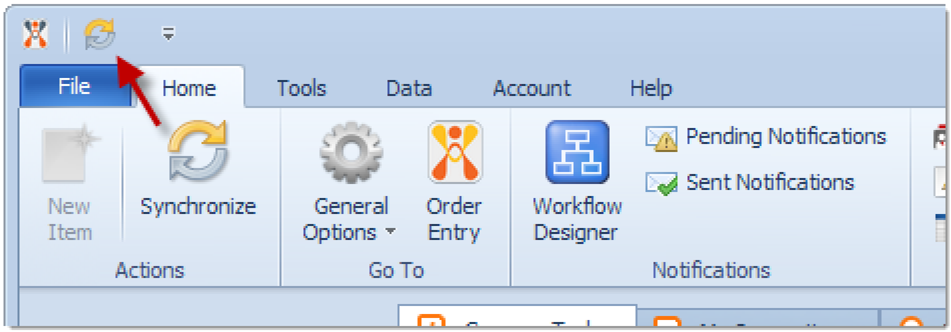


The File menu

Any command from the ribbon may be placed in the Quick Access Toolbar, located above the **File** menu. To associate a command with the toolbar, right-click on the appropriate button in the ribbon and choose **Add to Quick Access Toolbar**:

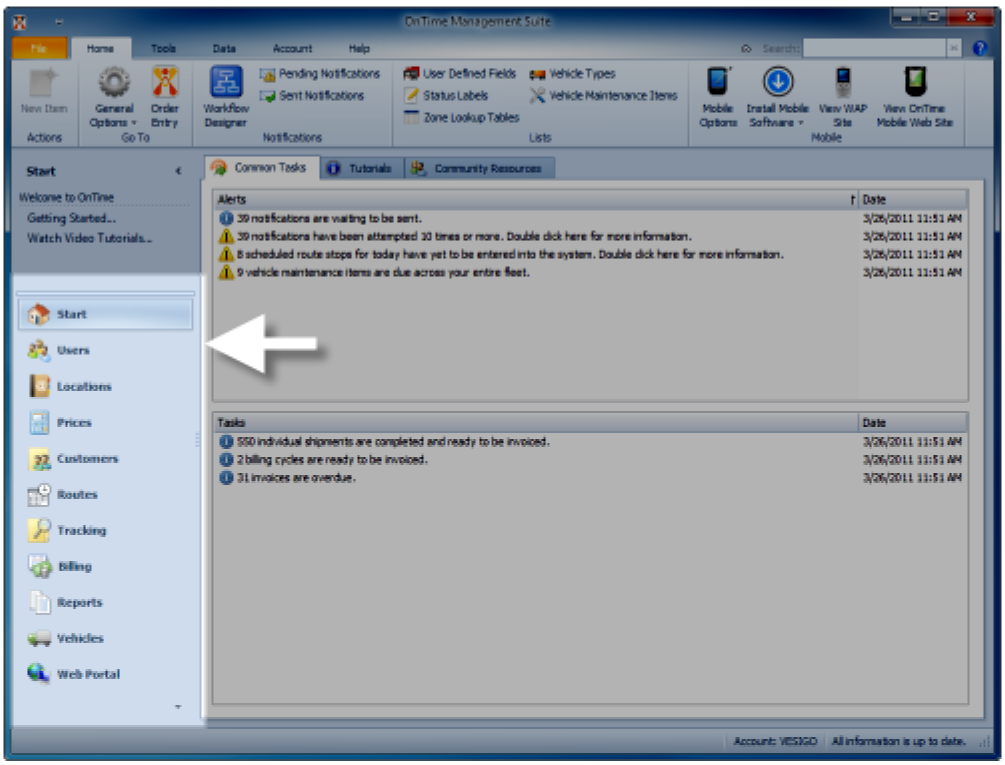


A shortcut to the chosen command will be added to the Quick Access Toolbar as shown below:



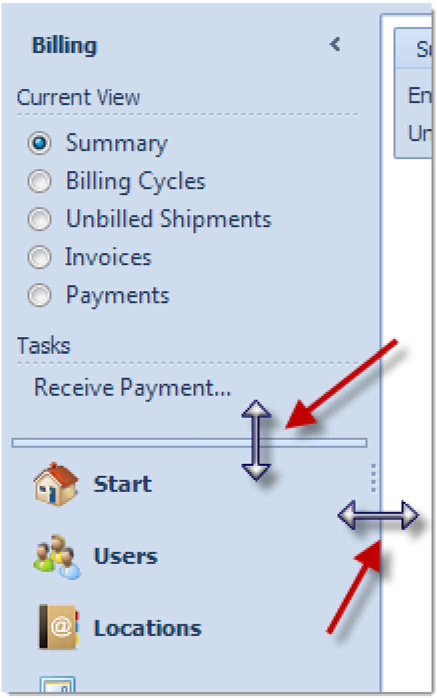
The Navigation Bar

The navigation bar appears in a vertical list along the left-hand side:

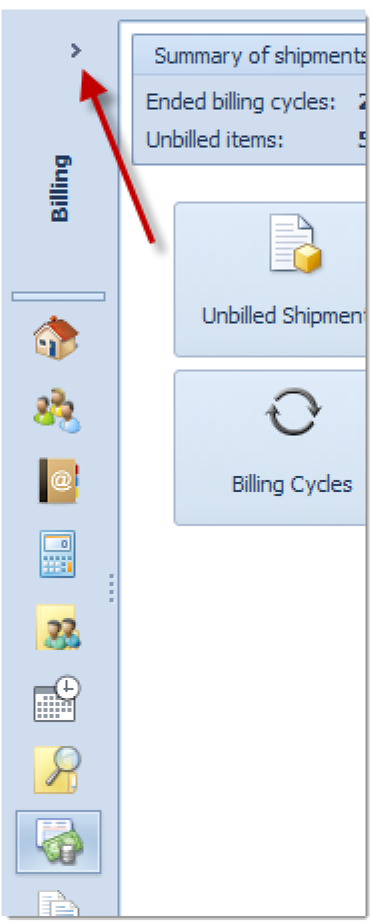


The navigation bar can explore different areas of the program without opening additional windows. Clicking on a navigation bar button will prompt OnTime to open the selected area in the region to the right.

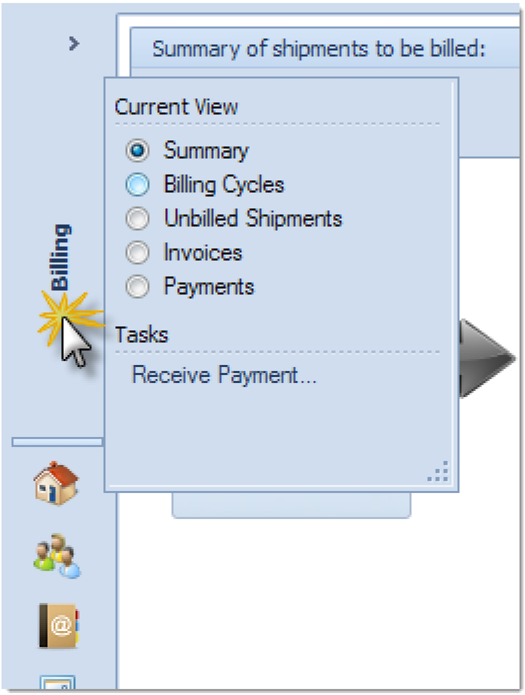
To resize the navigation bar, use the resizing bars as shown here:



To completely collapse the navigation bar, click the minimize button at the top of the navigation bar:

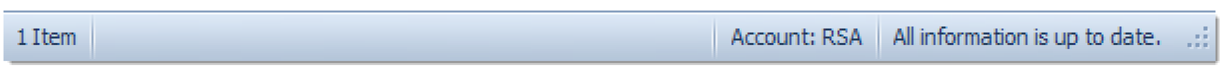


To re-gain access to the navigation bar, click the header test, as illustrated below:



The Status Bar

The status bar is along the bottom of the application window:



The status bar provides the following information:

- The number of items displayed in the currently displayed list
- The OnTime account currently logged in to
- The current connection and synchronization status of the program with the OnTime service

Chapter 3: Setting Up an OnTime Account

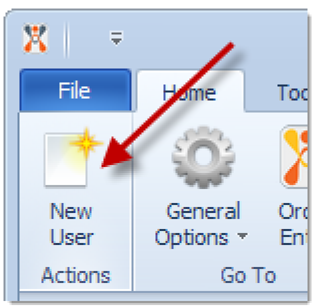
Complete the following steps to appropriately setup a new OnTime account.

Step 1: Add Users

Add any person or entity who should have access to OnTime, including employees, subcontractors, agents, and partners. Remember that each subscription level comes with an included number of users and exceeding that number will incur extra fees.

Add a New User

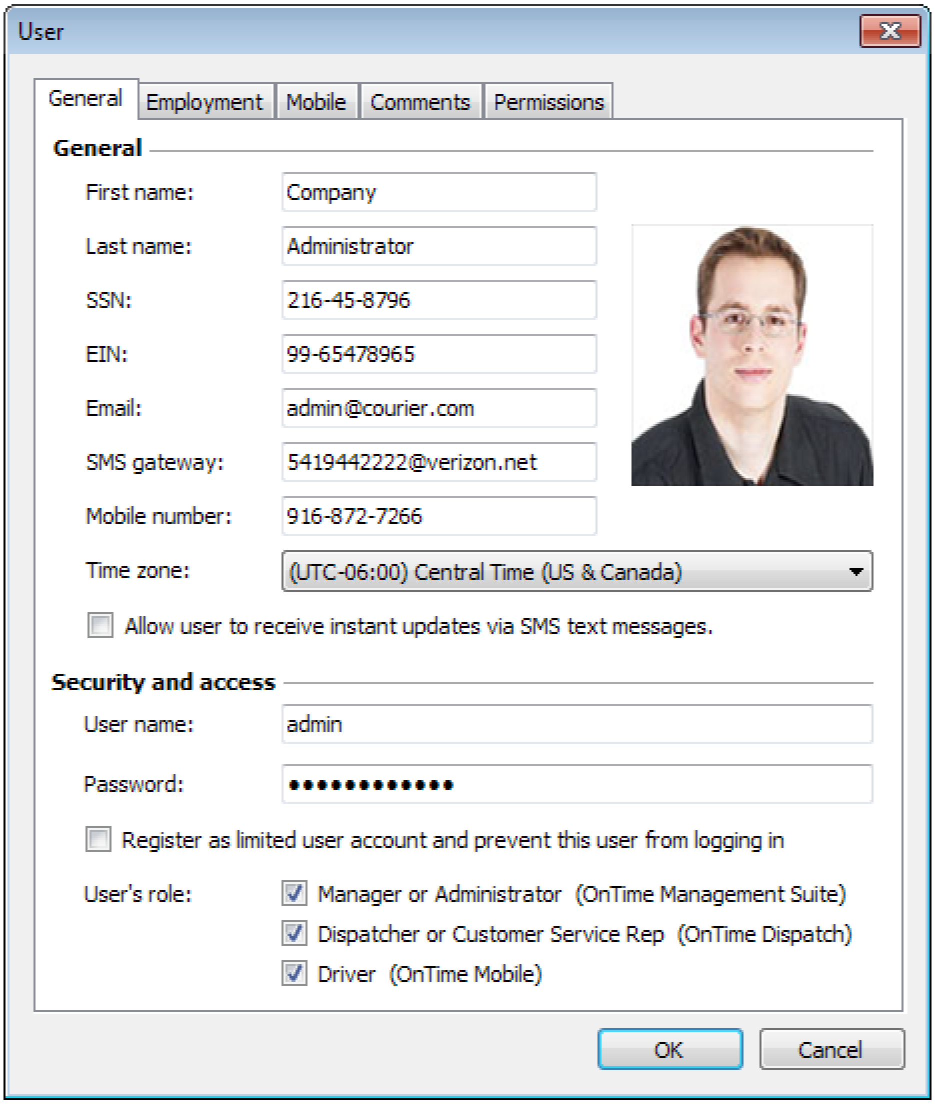
1. Navigate to the **Users** area by clicking the Users button in the navigation bar
2. Click the **New User** button in the upper left-hand corner:



3. Set up the new user by entering the appropriate information into the resulting window.

General Information

The **General** tab allows common information about the selected user to be entered. For example:



Sample user account

Notable fields:

- Fill out the **email** and **SMS gateway** fields to send messages to the user in the field. The **SMS gateway** should be the email address version of the user's mobile device number. For instance, with AT&T this might be in the format of 5553339999@txt.att.net. If the service provider's email format is unknown, utilize a search engine or contact the appropriate service provider.
- Check the **Allow user to receive updates via SMS text message** to send SMS text message notifications to the user when events occur in OnTime.
  - o **Note**: This may incur additional fees from the user's cellular carrier.
- Set the **time zone** to match the location of the user.
- Set the **user name** and **password** fields. The user will need these credentials to log in to OnTime and its programs. The **user name** and **password** may be changed in this window at any time.
- Check the box labeled **Register as limited user account** for any users that will not be logging into any OnTime software. Checking this box will avoid a usage fee for the associated user.

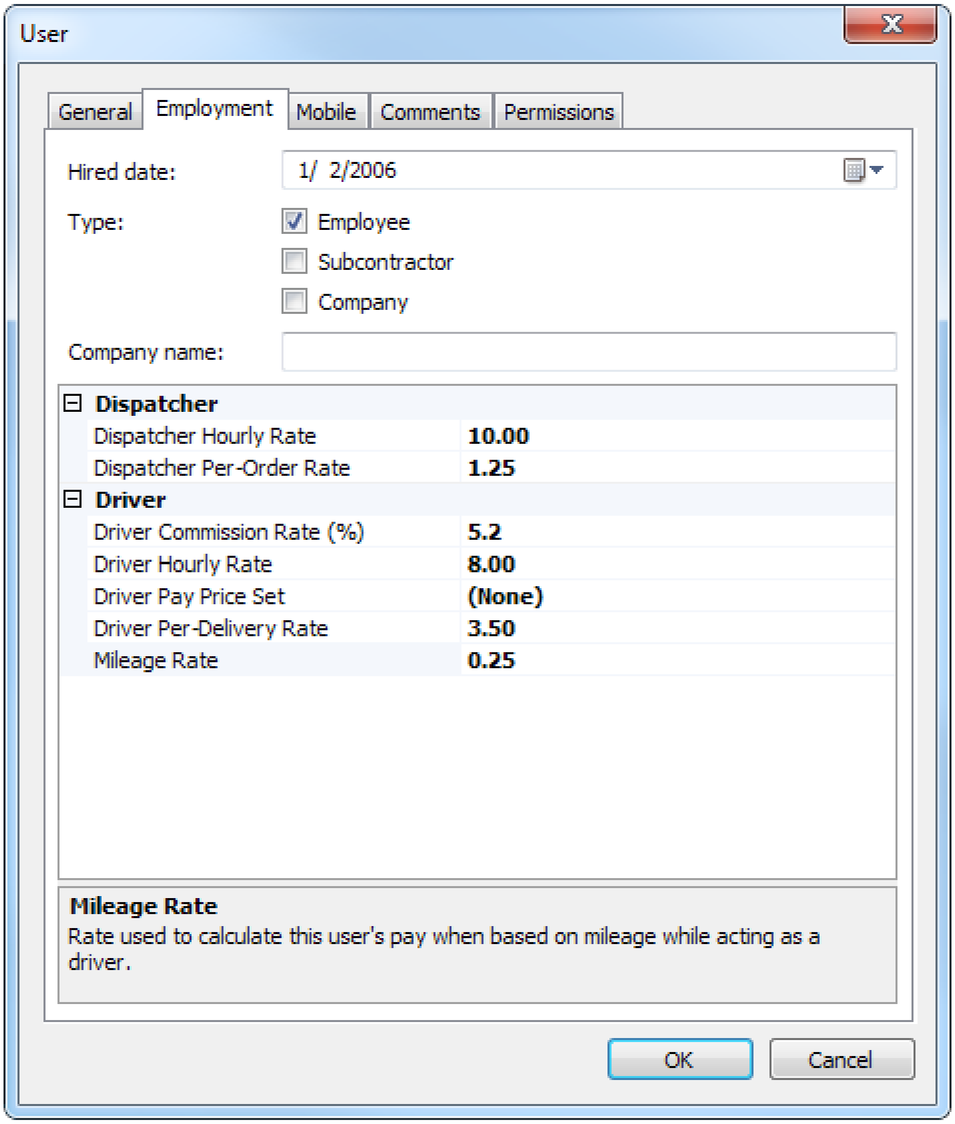
- If the user is a driver, check the **OnTime Mobile (Driver)** box to allow access to *OnTime Mobile*.
- If the user is a dispatcher, check the **OnTime Dispatch (Dispatcher)** box to allow access to *OnTime Dispatch*.
- If the user is an administrator, check the **OnTime Management Suite (Manager)** to allow access to *OnTime Management Suite*.
- To associate an image with the user, click on the **User Image** button and locate the desired image from the hard drive.

Employment

This section helps OnTime to track the time and activity of users.

Open the **Employment** tab and fill out the necessary fields. Be sure to enter the appropriate rates for whether a user is acting as a driver or as a dispatcher.

Click on the name of a rate to view a description indicating that rate's function. Rate values are compounded, meaning that each one will be used to calculate a grand total, allowing for more complex payment methods.



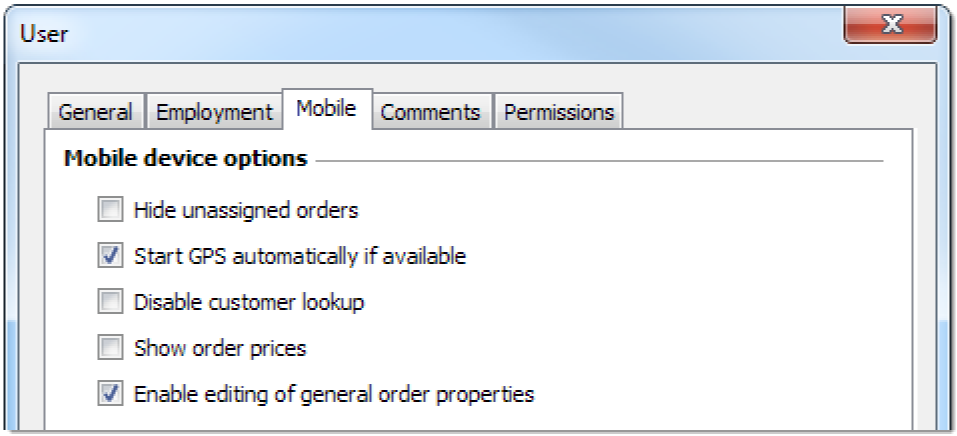
Sample user compensation

Note: The **Employment** tab is part of higher subscription plans. If the fields on this tab are inaccessible, consider upgrading to OnTime Professional or higher.

Mobile Settings

The **Mobile** tab allows access to settings that control the experience of mobile users in the field. OnTime allows every user to have individualized settings to suit personal needs and preferences.

Select the options needed for each user:



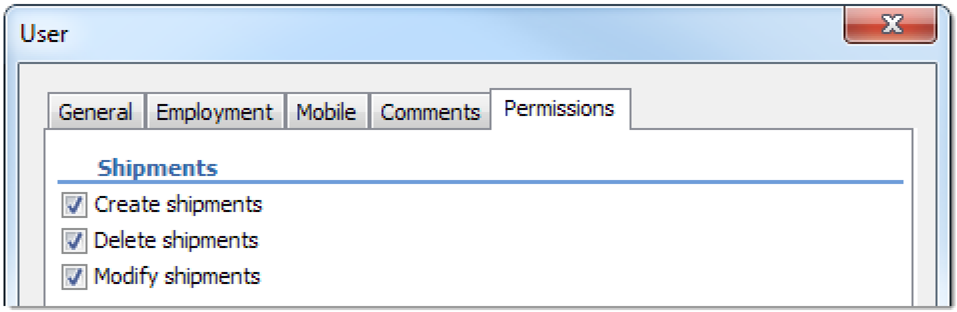
- **Hide unassigned orders**: Only orders that have been assigned will be displayed on the user's mobile device. This option will prevent the user from accepting orders that have not been dispatched.
- **Start GPS automatically if available**: At startup, OnTime Mobile will attempt transmission of the user's position via GPS (if GPS is available in a compatible format on the mobile device). We recommend selecting this option to track the positions of drivers.
- **Disable customer lookup**: Prevents the user from searching for customer contact details in the database.
- **Show order prices**: Allows the user to view the total prices of an order.
- **Enable editing of general order properties**: Allows the user to edit certain properties of orders directly from a mobile device, including:
    - Requested by
    - Quantity
    - Weight
    - Height, width, and depth
    - Status labels
    - Description
    - Comments

Comments

The **Comments** tab presents a text field where private comments about the user may be entered. The contents of this field are not used in other areas of OnTime.

Permissions

Permissions determine which features a user can employ within the OnTime program. By default, all of the tasks in the **Permissions** tab are enabled. To prevent a user from performing a certain task, uncheck that item in the list.



Congratulations! The first user has been successfully setup in OnTime. Repeat this process until every person or entity that will be using the software has been added as a user.

Billing Considerations Regarding Users

- Remember that each subscription level comes with an included number of users and exceeding that number will incur extra fees.
- Employees who do not need to use the OnTime software do not need to be set up as users.
- Any driver whose phone does not have a data connection does not need to be set up as a user
- Customers (the shippers) are not considered users. OnTime allows for an unlimited number of customers.

Situations when a User Account is not Billable

Any OnTime user that will not be logging into the software can be registered as a limited user account. This signals OnTime to allow the user to exist, but prevents the system from counting that user as a billable account.

If you have any questions on how the addition of users will affect the pricing on your monthly OnTime bill, feel free to contact OnTime Sales for consultation.

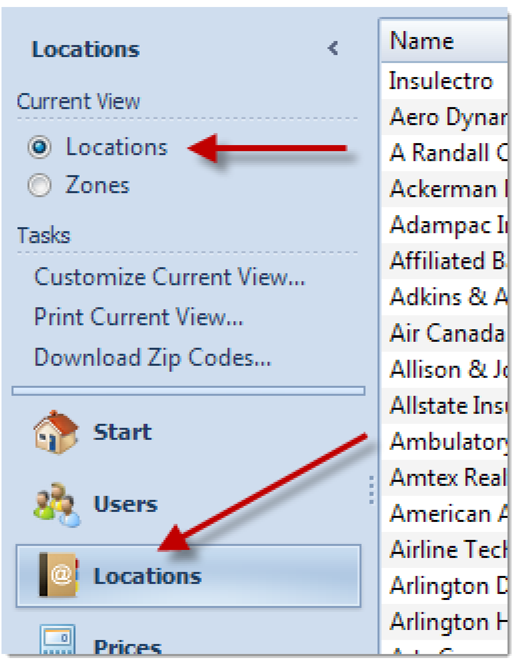
Step 2: Add Locations and Zones

How to Add Locations

OnTime helps to keep track of addresses serviced by maintaining a list of locations. These addresses are tagged with valuable information, such as the associated zone and the longitude/latitude coordinates. All addresses used by OnTime are stored in the **Locations** list.

To Access the Locations List

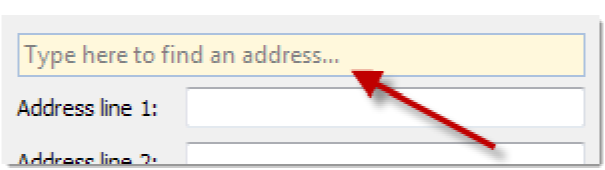
1. Click the **Locations** navigation button
2. Select **Locations** as the view type:



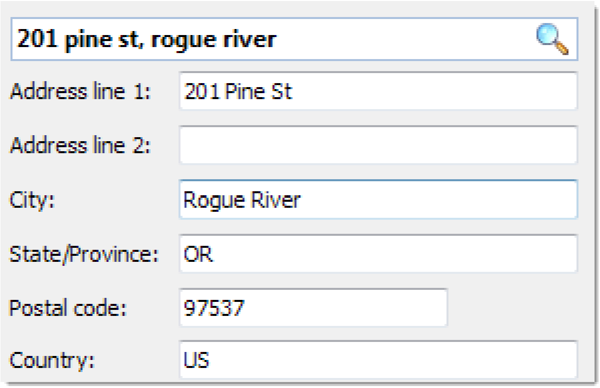
To Add Locations Manually

1. Click the **New Location** button in the upper left-hand corner
2. Enter the name and address of the location

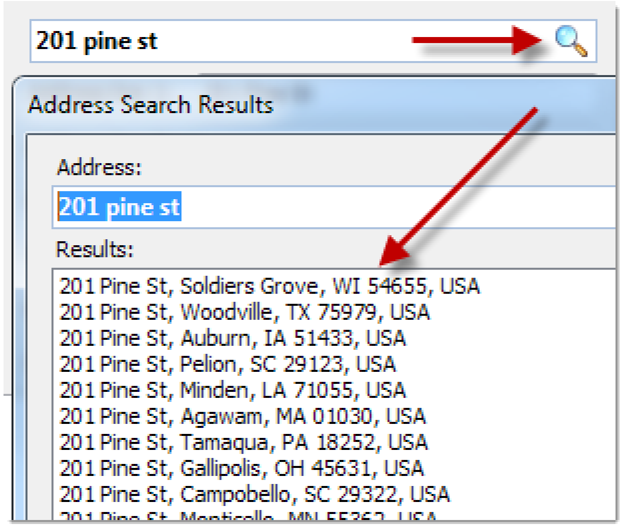
TIP: Save time by entering the first part of an address into the yellow search box:



The address will be properly formatted and geocoded, allowing for mileage calculation to and from the address. For example, by typing in the street and city, OnTime automatically formats and fills out the whole address:



If an ambiguous address is typed in, OnTime may find multiple matches. In such cases, click on the search icon to view all possible matches:



OnTime will automatically attempt to recommend the appropriate zone after a postal code is entered.

Note: If zone-to-zone pricing is being used, select a zone for each address. Addresses that are not assigned to a zone may be inaccurately priced.

To Add Locations in Bulk

- Import a list of locations from an Excel or CSV file via the **Import Data** option from the **Data** tab in the ribbon. More information on how to use this feature is available later in the Importing Data section of Chapter 4.

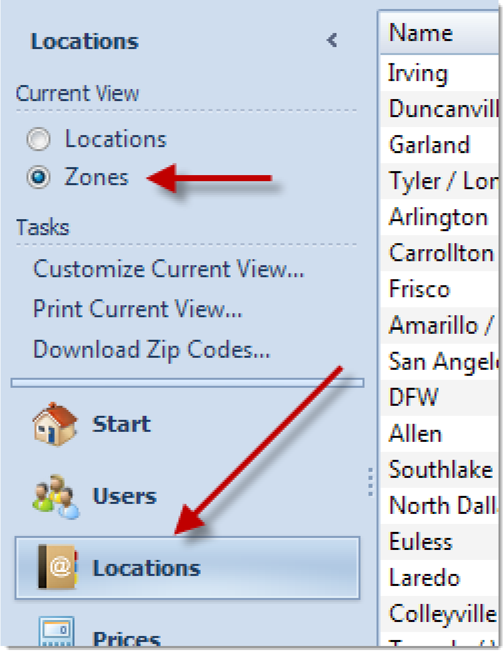
How to Add Zones

Setting up a list of zones will be an important step for companies using zone-to-zone pricing. The name of a zone and any postal codes associated with it may be entered into OnTime.

Tip: A list of all zip codes in a particular area can be downloaded through OnTime (United States only).

To Access the Zone List

1. Click the **Locations** navigation button
2. Select **Zones** as the view type:



Note: Many couriers prefer to use mileage based pricing over zone-to-zone based pricing. The setup and maintenance of mileage based pricing generally consists of entering a short mathematical formula. Zone-to-zone pricing requires the setup and maintenance of large grids of prices. We recommend mileage based pricing for users who are unsure of which method to use to generate pricing and who can rely on mileage.

To Add Zones Manually

1. Click the **New Zone** button
2. Enter the desired name for the new zone
3. Enter a postal code to be associated with the zone. Separate multiple postal codes with commas.

To Add Zones in Bulk

- Import a list of zones from an Excel or CSV file via the **Import Data** option from the **Data** tab in the ribbon. More information on how to use this feature is available later in the Importing Data section of Chapter 4.

Using the **Download Zip Codes** link will automatically create a zone based on each zip code retrieved (only in the United States).

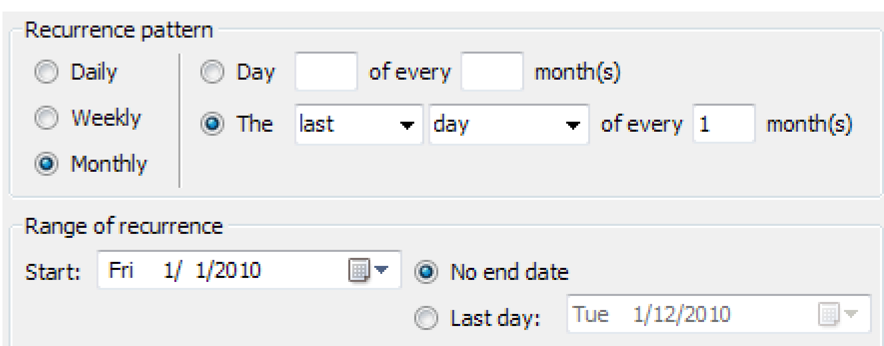
> **Note:** The Download Zip Code feature may result in amassing too many zones. Too many zones will create exceedingly large price grids, which are extremely difficult to maintain and can lead to slower program performance.

Step 3: Add Customers

OnTime stores valuable information about customers such as a personal profile, pricing, and account balance. This information will allow for customers to manage their accounts online and for dispatchers to place orders more efficiently. The customer list may be accessed by clicking on the **Customers** navigation bar button.

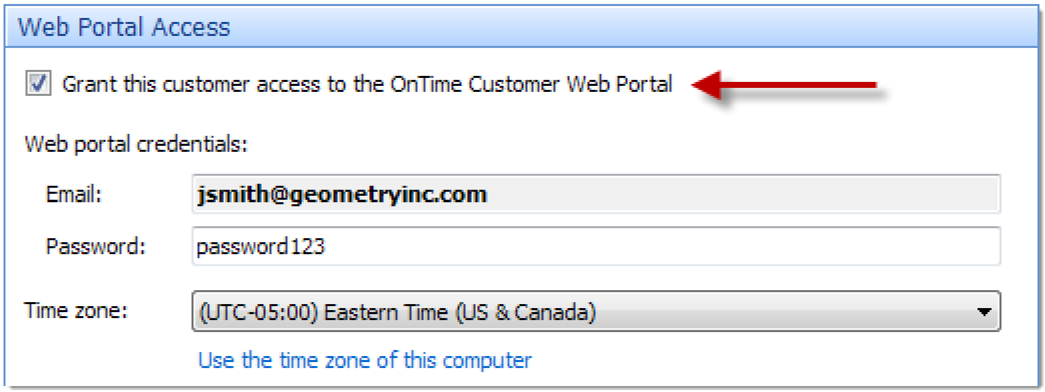
To Add Customers Manually

- Click the **New Customer** button and enter appropriate contact information for the customer
- To distribute the customer's invoice to multiple departments, enter the associated names under the **Departments** section
- Sub accounts for customers can be made in the **Contacts** section. More information on this feature is available in the Contacts section of Chapter 4.
- Skip the **Notifications** section for now. More information on creating those is available in Step 5: Setup Notifications in this Chapter.
- The **Price Sets** section will list the pricing that should be assigned to this customer. Skip this for now as we'll be adding price sets during Step 4: Configure Pricing.
- Set the **billing email** address under the **Billing** section. This email address will later be used to email invoices to the customer.
- If necessary, change the **preferred pricing method** under the **Billing** section. The two methods to choose from are distance based pricing (default) and zone-to-zone based pricing.
- If appropriate click the **Set Billing Cycle** button and configure the cycle's schedule. At the end of each cycle, *OnTime Management Suite* will automatically notify the user to generate invoices based on all activity within that cycle.

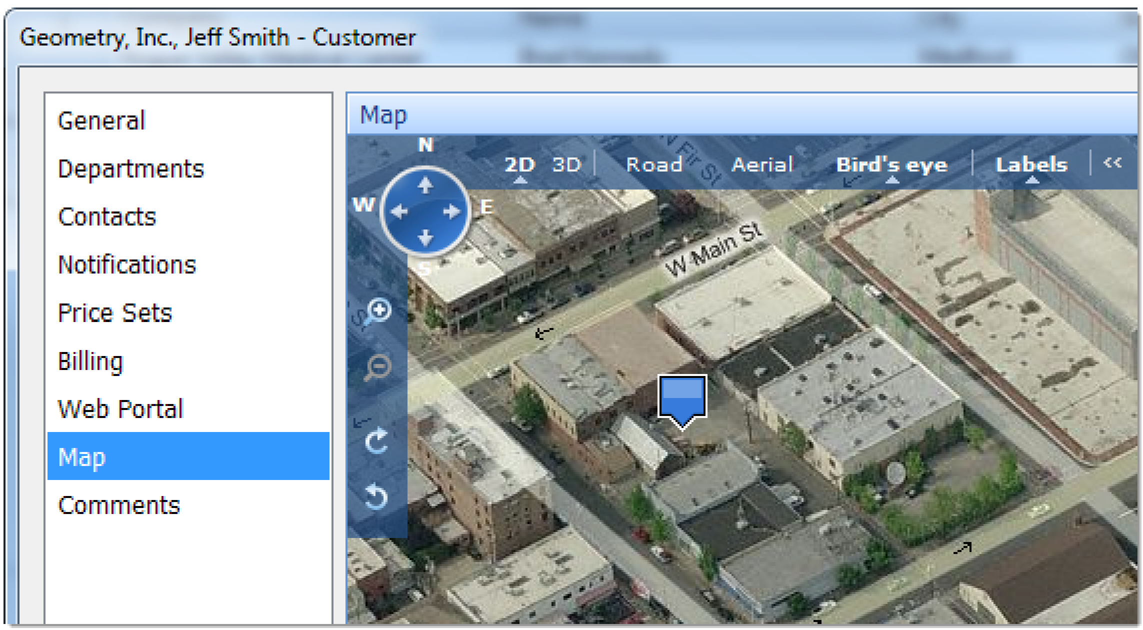


Sample billing cycle schedule set to the last day of every calendar month

- Fill out all of the fields within the **Web Portal** section to allow the customer access to the *OnTime Customer Web Portal*: All fields here should be filled out in order for the customer to gain access to the web portal. The check box for granting access must be checked. The **email** address used is actually the email address from the **General** section. (Alternatively, the account number may be used if more appropriate.) The time zone drop down box allows you date and times to be set to be converted to the customer's local time.



- The **Map** section shows an interactive map of the customer's address as specified on the **General** tab:



- The **Comment** section contains a large text box for entering in miscellaneous information about the customer. Comments are kept private and are never displayed to the customer.

To Add Customers in Bulk

A list of customers from an Excel or CSV file may be imported via the **Import Data** option from the **Data** tab in the ribbon. More information on how to use this feature is available later in the Importing Data section of Chapter 4.

Note: Only general customer information may be imported. Specialized information for the customer, such as web portal access and billing cycles, must be set up manually.

Step 4: Configure Pricing

OnTime offers a flexible approach to pricing to help to calculate prices during order entry. In OnTime, pricing is bundled into *price sets*. Price sets represent contracted rates with a customer and the level of service associated with those prices. On the public facing side (to your dispatchers and customers), price sets are referred to as *service levels*.

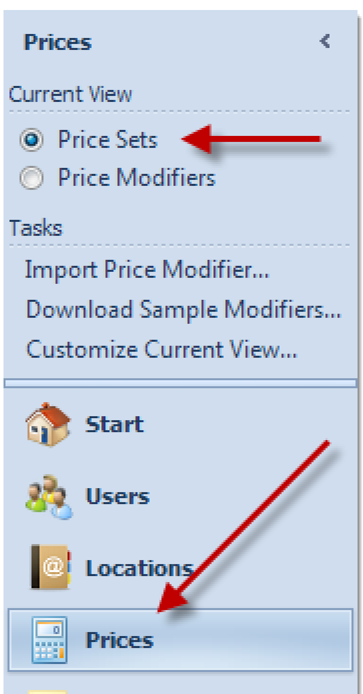
To Setup Pricing in OnTime

1. Create a price set
2. Establish the base price
3. Create any necessary optional charges (price modifiers)
4. Link the price modifiers to the appropriate price sets
5. Link the price sets to appropriate customers

Creating a Price Set

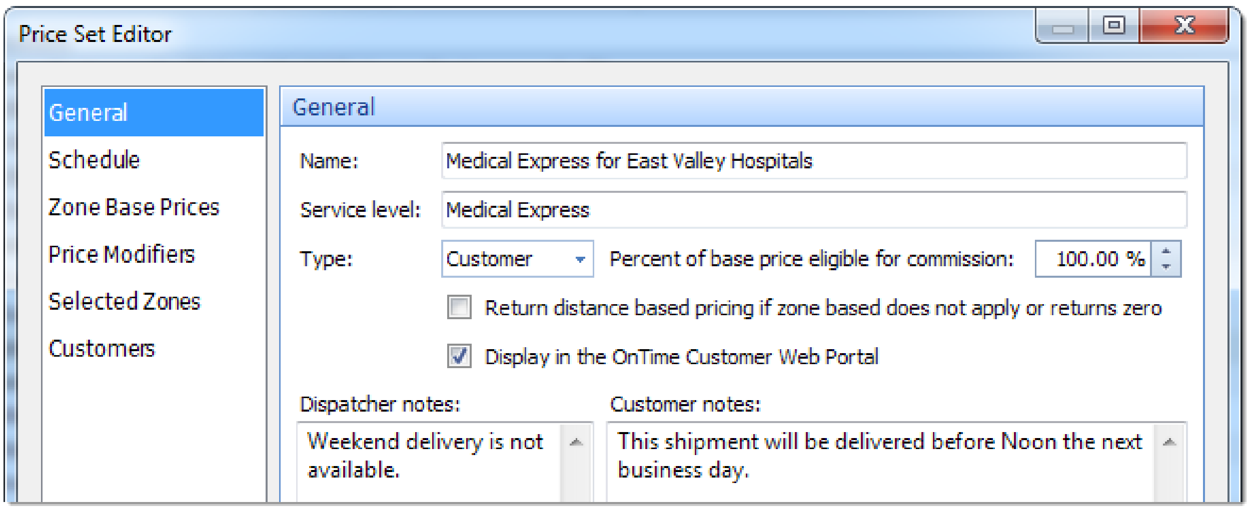
To create a price set:

1. Navigate to the **Prices** area
2. Set the view to **Price Sets**:



3. Click the **New Price Set** button in the upper left-hand corner to create a new price set
4. Enter a **Name** to identify the price set to employees internally

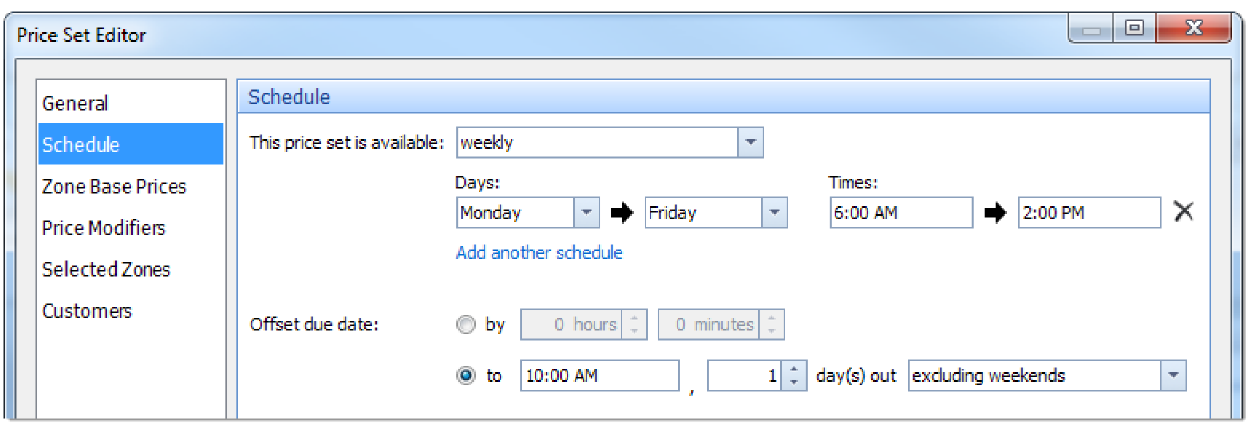
5. Enter a **Service level** name to identify the price set to dispatchers and customers
6. Set the **Type** to **Customer**
7. Leave the **Percent of base price eligible for commission** (the amount of the service level used to calculate workers' commission) at 100% for now
8. Enter **Dispatcher notes**, which will appear to dispatchers who select this service level in the *OnTime Dispatch* application
9. Enter **Customer Notes**, which will appear to customers who select this service level in the *OnTime Customer Web Portal*



Sample price set

Set the Schedule

OnTime allows for flexible schedules to be attached to price sets. For example:



Sample price set schedule (Next day service, excluding weekends, delivered by 10 AM – must be received by 2 PM)

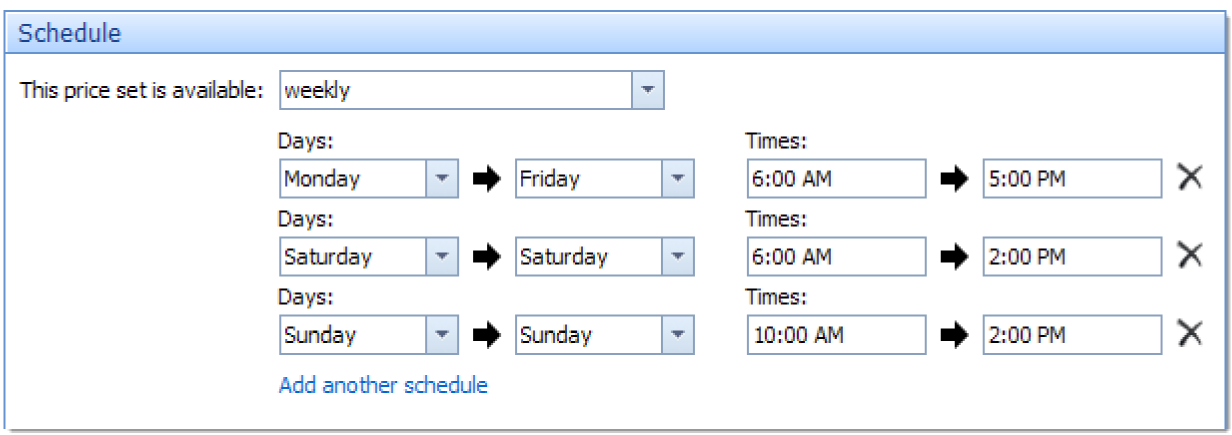
The upper portion of the schedule specifies the dates and times that the price set will be made available. Choices include:

- **Never**: The price set will never be made available
- **Anytime**: The price set will always be made available
- **Weekly**: The price set has a starting and ending day of the week, along with times for each day. For example: Monday thru Friday, 9:00 AM to 5:00 PM
- **On specific dates**: The price set has a starting and ending date and time

Note: The schedule affects customers and dispatchers. Normally, the current time is used to determine if the schedule attached to a price set allows the customer to select that price set. If the current date and time is outside of the schedule, the price set will not appear in the list of service levels in the order entry screen. Dispatchers using *OnTime Dispatch* will see available price sets based on the date into the **date submitted** field.

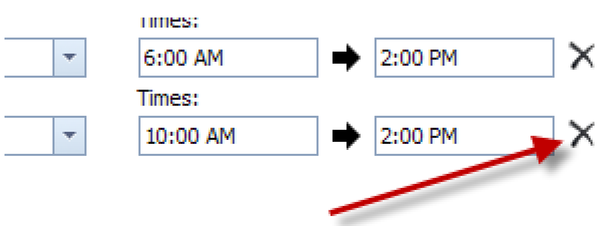
When "**weekly**" or "**on specific dates**" has been selected as an option, additional fields will appear. To specify multiple entries into any of the resulting fields, click on the link labeled **Add another schedule**. For example:

- Monday – Friday, 6:00 AM to 5:00 PM
- Saturday, 6:00 AM to 2:00 PM
- Sunday, 10:00 AM to 2:00 PM



To adjust and maintain a schedule on any price set, modify the days and times as desired.

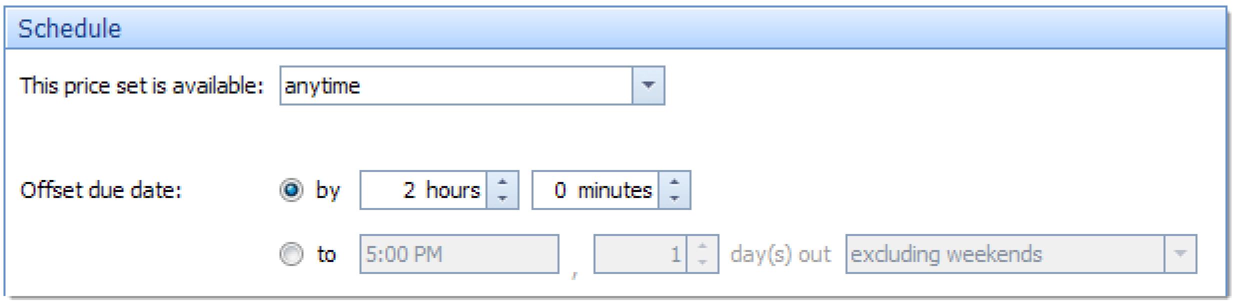
To remove one of the rows in the schedule, click the delete icon on the right-hand side of the schedule row:



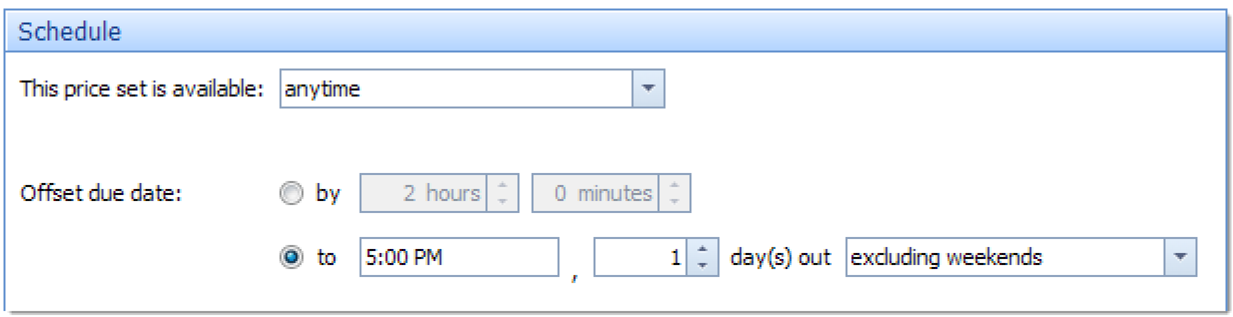
The *due date offset* is the amount of time between when the order is placed and when it should be delivered. A properly configured due date offset will prevent dispatchers and customers from setting up delivery times earlier than can be guaranteed. This offset can be expressed in two ways:

- By a certain amount of time
  (Example: At any time of day, the customer will have their package delivered in 2 hours)
- By a certain time of day
  (Example: At any time of day, the customer will have the package delivered by 5:00 PM on the next business day)

Here's how the two above examples would be setup in OnTime:



At any time of day, the customer will have their package delivered in 2 hours



At any time of day, the customer will have the package delivered by 5:00 PM on the next business day

If offsetting the due date is unnecessary, leave the **hours** and **minutes** set to zero.

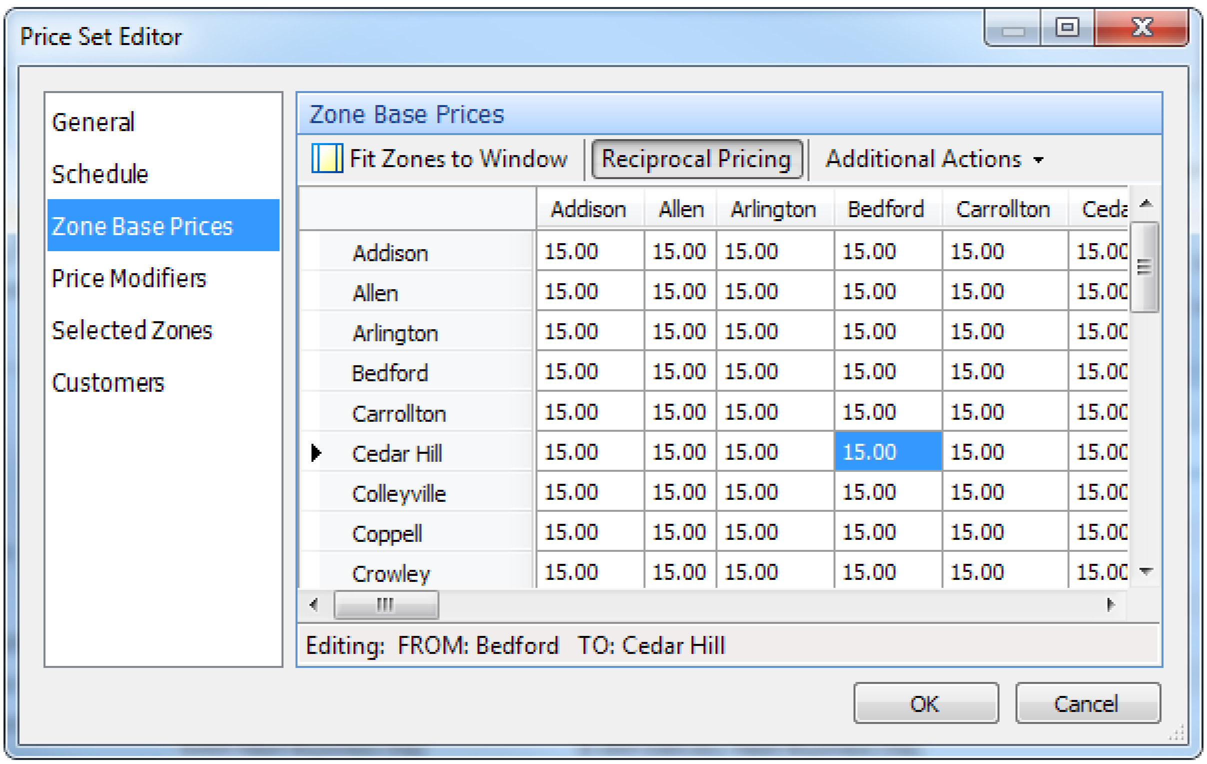
At this point, a new service level has been defined and pricing should be added. Three primary methods may be used to establish a base price: zone-to-zone, distance, and flat rate.

> **Note:** Prices in OnTime are calculated by calculating the base price and then calculating additional options using that base price.

Establish Zone-To-Zone Base Prices

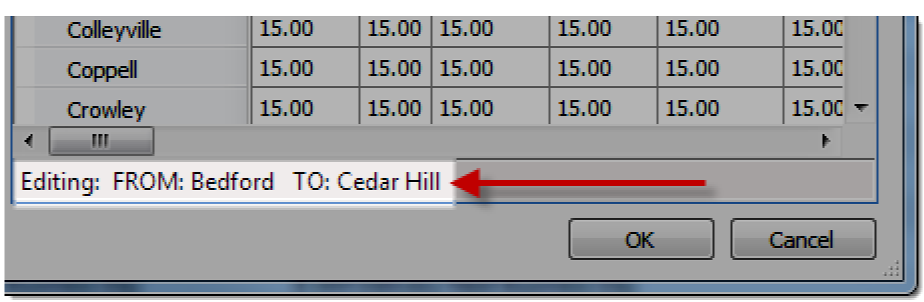
OnTime offers a way to input zone-to-zone prices, allowing for simplified price generation based on a fixed amount between two points.

Zone base prices are displayed as a grid, with “from” zones across the top and “to” zones down the left-hand side. To specify a price between two zones, locate the point on the grid where the two zones intersect and enter the desired price into that cell.



Sample zone-to-zone price grid

For help specifying different amounts between zones based on direction, look at the bottom of the grid for information regarding the direction of the currently selected cell:



OnTime can help to significantly speed up the input of these prices using a few tools:

- **Reciprocal Pricing:** If an amount is entered into a cell connecting location (A) to location (B), OnTime will automatically input the same amount into the corresponding cell that connects location (B) to location (A). This feature is on by default.
- **Additional Actions > Fill Empty Cells With:** Automatically inputs a chosen amount into all empty cells. To use this feature, enter the desired amount (without the currency symbol) and then click **OK**.
- **Additional Actions > Adjust All Values:** If a grid is populated with prices and the values need to be increased or decreased enter the desired adjustment amount (without the currency or percentage symbol), choose how to apply the value (as a fixed number or a percentage), and click **OK**. The cells will automatically adjust accordingly. To decrease the prices, preface the amount with a negative symbol (for example: -1.50).

> **Note:** Only cells that have a value will be adjusted.

Establish Distance Based Prices

Many OnTime users prefer distance based pricing because it tends to be easier to maintain, change, and grow than zone-to-zone based pricing.

Two things are needed to make distance based pricing work well:

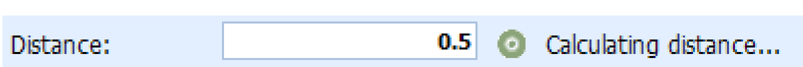
1. A way to get an accurate measurement of the distance between the two points of delivery (*Acquiring the Distance* section, below)
2. A formula to calculate the price based on the distance (*Calculating the Cost for Distance* section, below)

Acquiring the Distance

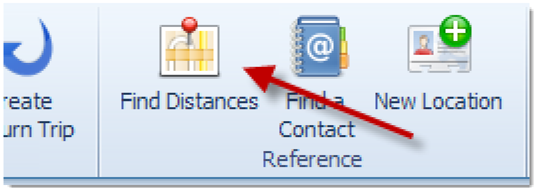
OnTime helps to automatically determine the distance between locations. OnTime begins this process with the most accurate methods, progressing to more dependable but less accurate methods:

1. OnTime checks for previously delivered orders between the two. If a matching order is found with an associated distance, that distance will be used. If there are multiple matches, the most recent distance will be used.
2. OnTime geocodes the two addresses and plots them on a map. Distance is then measured using preferred roads.
3. OnTime geocodes the center positions of the two postal or ZIP codes on a map. Distance is then measured using preferred roads.
4. OnTime geocodes the center positions of the two postal or ZIP codes on a map. Distance is then measured as a straight line.

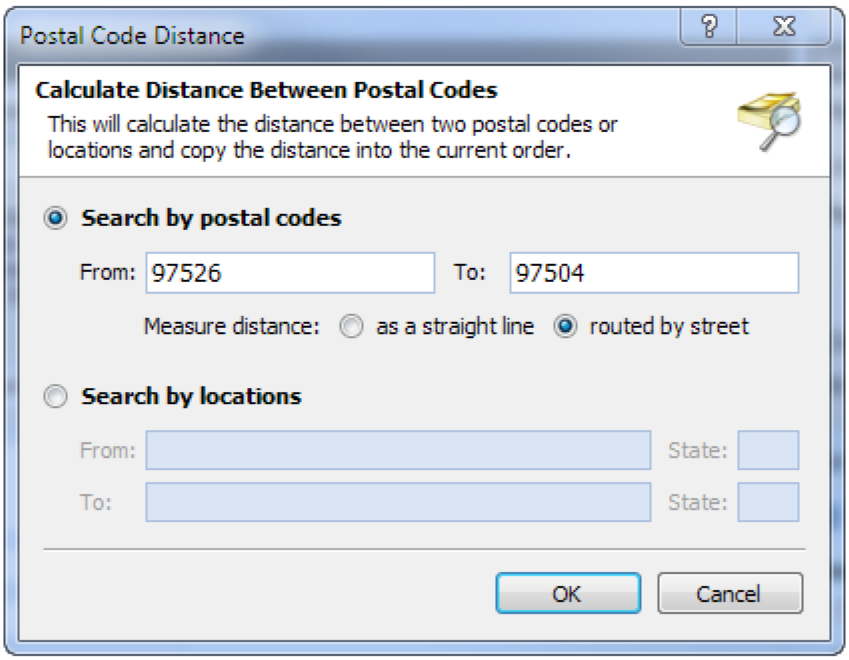
OnTime processes this information quickly. A progress indicator displays may be viewed in *OnTime Dispatch*:



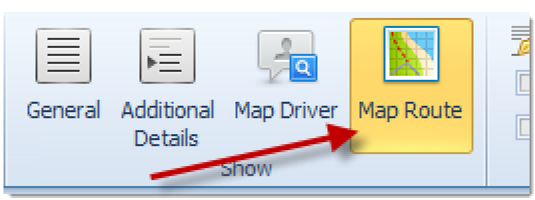
This process is performed automatically when two addresses are entered into the order entry form. To get a distance based price on only postal or ZIP codes, click the **Find Distances** button in *OnTime Dispatch*:



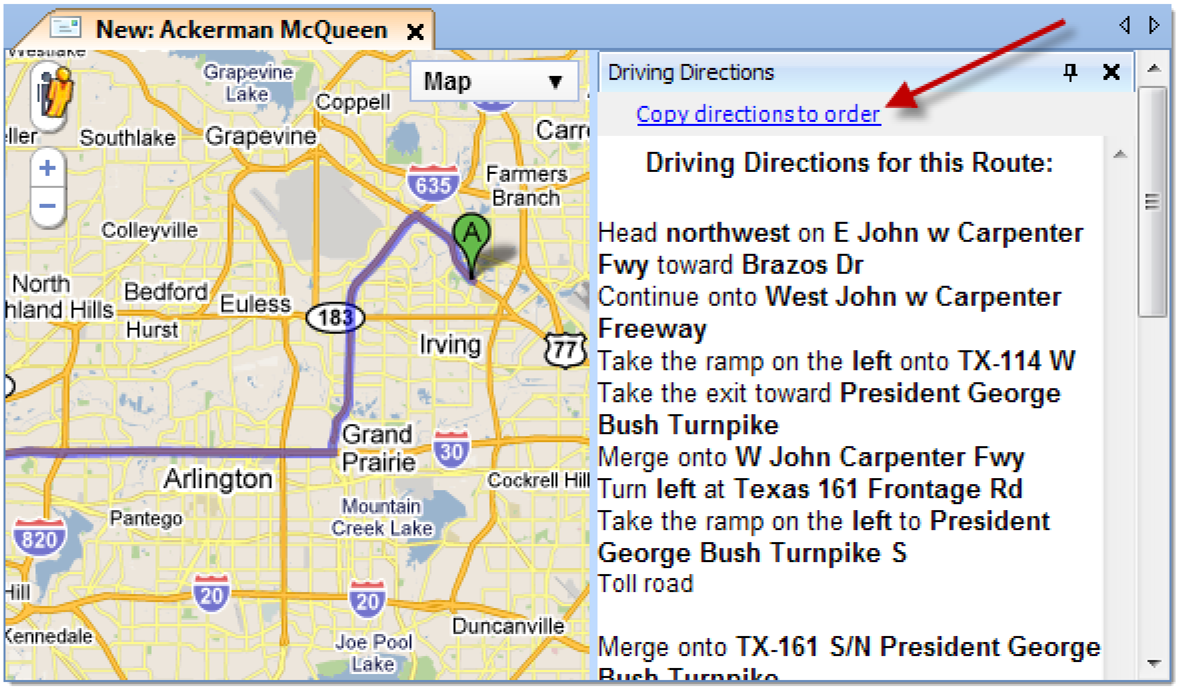
A window with space to enter two postal codes will appear. Enter the desired codes and then specify how to measure the distance in-between. Click **OK**. The calculated distance will be automatically entered into the **Distance** field on the order entry form.



To map the driving route between the two locations and acquire turn-by-turn directions for drivers, enter two full addresses into the order entry form and click the **Map Route** button:



The resulting map will offer visual confirmation that the calculated route and corresponding mileage are correct. Copy the turn-by-turn directions into the comments section of the order by clicking **copy directions to order**.



Sample route map

Calculating the Cost for Distance

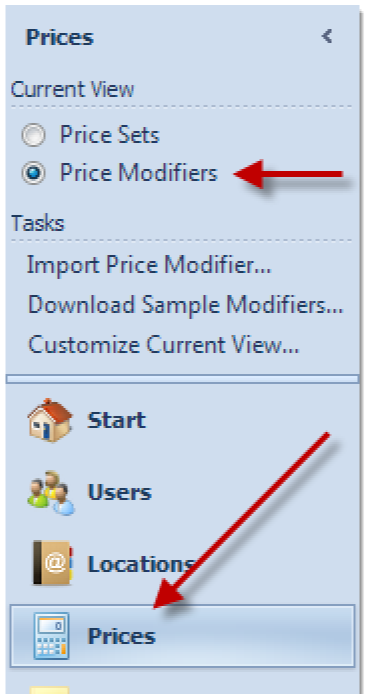
Many couriers are familiar with the idea of creating a formula in a spreadsheet, such as Excel, to calculate the cost of a delivery based on the distance. Common scenarios include a flat per mile/kilometer rate or a minimum charge plus additional per mile/kilometer charges over a certain threshold. OnTime comfortably handles the same methods for calculating the cost of a delivery as programs such as Excel.

Price modifiers are a flexible way of implementing formulas for distance based pricing. Price modifiers may be compounded or nested to achieve the desired results. (The subject of price modifiers will be discussed in more detail later.)

EXAMPLES:

To create a mileage price modifier:

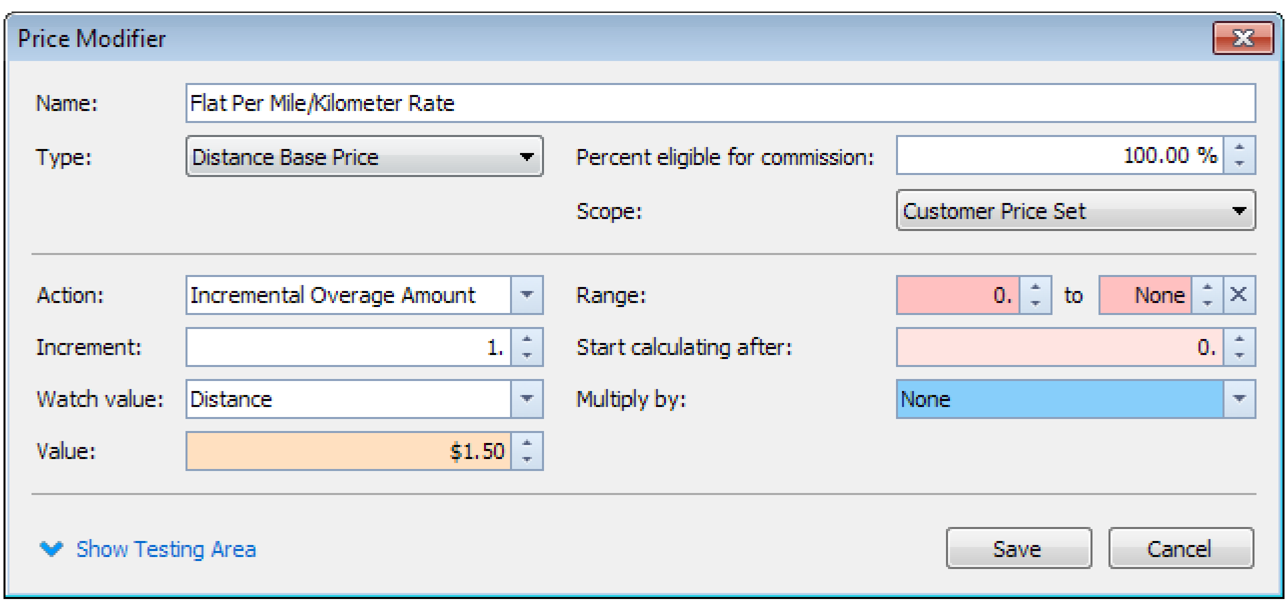
1. Navigate to the **Prices** area
2. Set the view to **Price Modifiers**:



3. Click the **New Price Modifier** button in the upper left corner to open a new price modifier.

To create a flat per mile rate:

1. Enter in the required information:



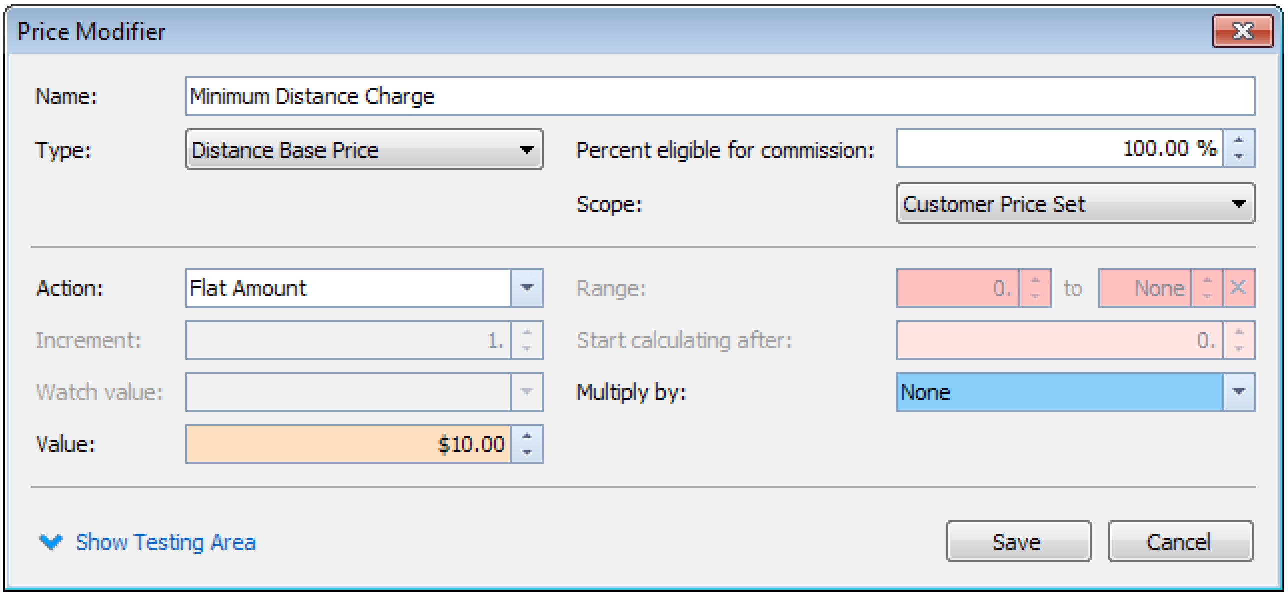
2. Click **OK** to save

The above example will effectively set up a pricing that charges $1.50 for every mile/kilometer over zero miles/kilometers. On a 10 mile/kilometer delivery, this modifier would calculate to $15.00.

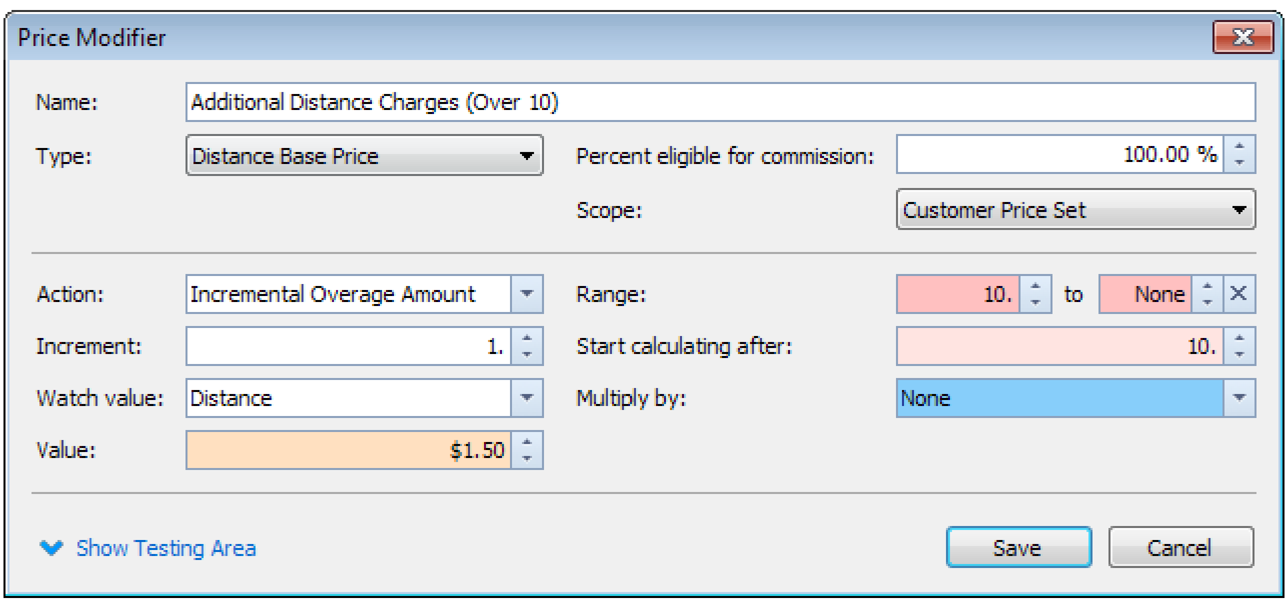
To create a minimum charge plus additional per mile/kilometer charges over a certain threshold:

This method of pricing has two aspects: a flat minimum charge and an incremental charge (on top). This complexity is easily handled by creating two price modifiers that handle each of the two aspects and then a third modifier that will *group* the two into one and add them together. Here's how that's done:

1. Create the first modifier to establish the minimum charge:



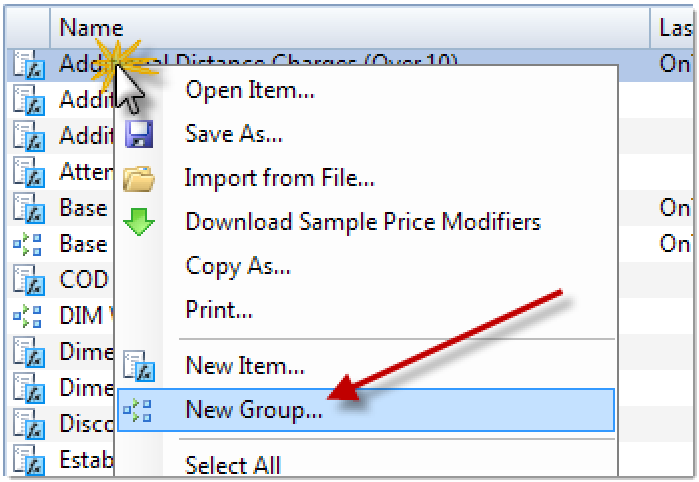
2. Click **OK** to save. This modifier will generate a price of $10.00 no matter what.
3. Create the second modifier to establish the additional per mile/kilometer charges:



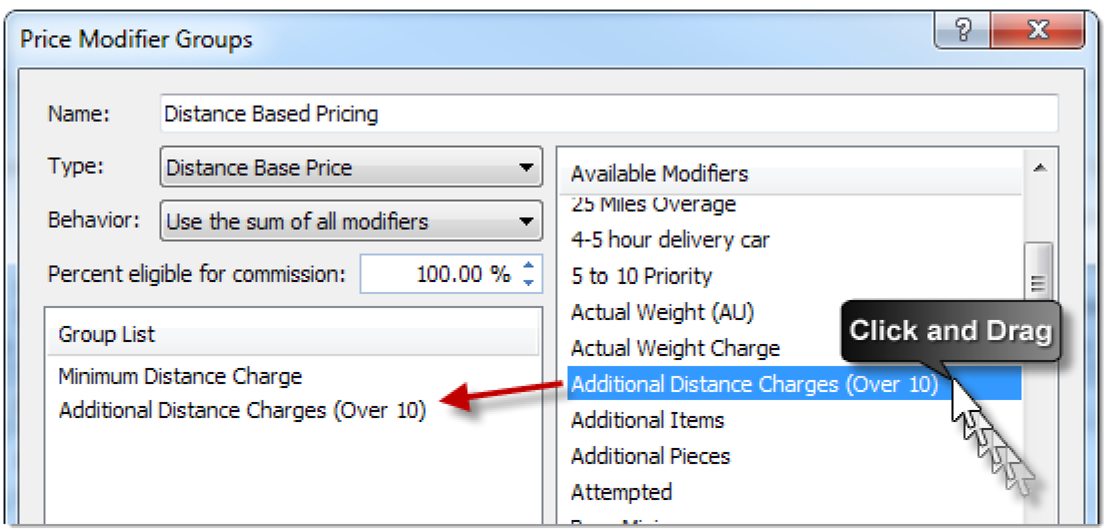
4. Click **OK** to save. This modifier will generate a charge of $1.50 per mile/kilometer for every mile/kilometer over 10 miles/kilometers.

Now that the two modifiers have been created, the next step is to combine them into one.

5. Right-click inside the price modifiers list and choose **New Group**:



6. Modifiers are grouped in this window by dragging them from the list on the right to the list on the left. Create the modifier group:



7. Click **OK** to save.

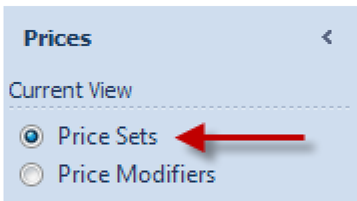
The end result: OnTime will always charge $10.00 as the base price and will add $1.50 for every mile/kilometer over 10 miles/kilometers. On a 20 mile/kilometer delivery, this calculation would be $25.00.

Of course OnTime is not limited to these examples. Thousands of different combinations may be employed to accommodate your business' unique pricing methods.

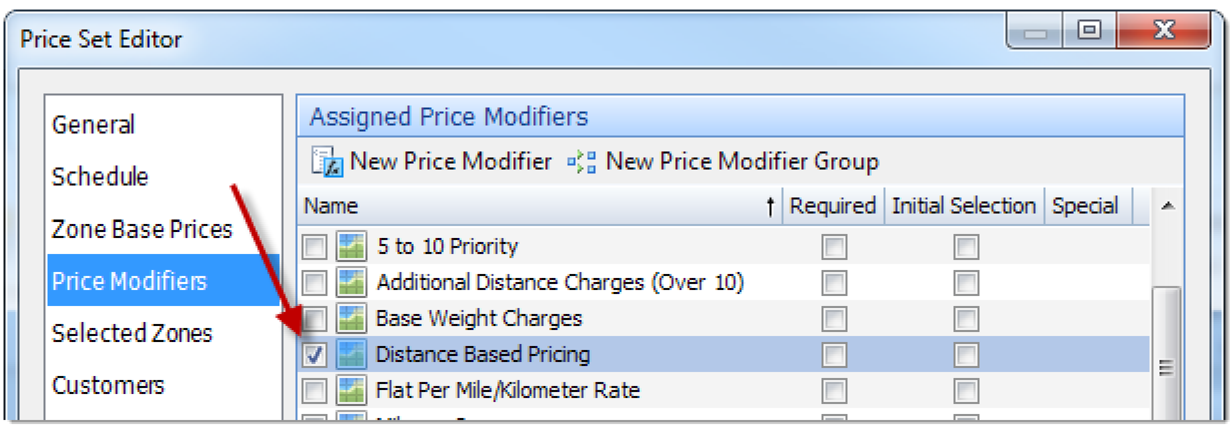
Once price modifiers have been created, attach them to a price set; when a customer selects that service level, OnTime will know which price modifiers to use to calculate the price. If price modifiers are not linked to a price set, the pricing will not appear in *OnTime Dispatch* or the *OnTime Customer Web Portal*.

How to Link Price Modifiers to Price Sets:

1. Enter the **price sets** list view:



2. Open the desired price set
3. Navigate to the **Price Modifiers** section
4. Locate the appropriate distance based price modifier in the list and link it to the price set by checking the box on the left:



If a *price modifier group* is being linked, individual price modifiers that make up that group do not need to be individually linked. Simply link the group itself and OnTime will automatically ensure that the necessary calculations take place.

5. The icon next to the charge looks like a small map. This icon indicates that the price modifier is a special modifier in charge of calculating the distance pricing.
6. Click **OK** to save the price set.

Combining both zone based pricing and distance based pricing into a single price set is possible in OnTime. Feel free to specify both so that your dispatchers will have additional flexibility when generating prices.

Using a Flat Amount as a Base Price

Flat amounts are entered by the dispatcher at the time of order entry. The **flat amount** field is available in *OnTime Dispatch* on the order entry form:

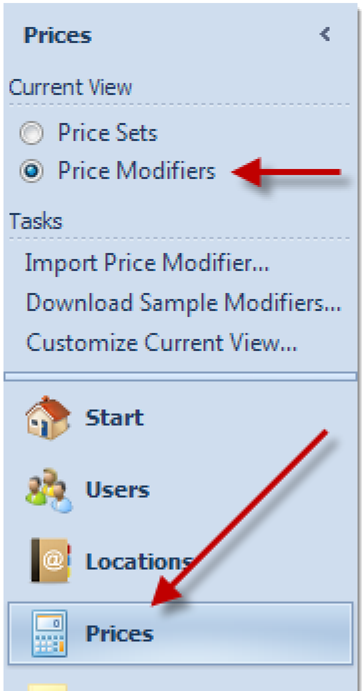
Creating Additional Charges

Accessorial charges or price modifiers may include things such as fuel surcharges, POD charges, wait time, and dimensional weight. In OnTime, optional or accessorial charges are built using *price modifiers*. Price modifiers may be grouped to create complex calculations.

Note: Re-adjusting any price modifier will prompt all of the pricing linked to that modifier to be automatically updated. Changing one of these price modifiers can easily realign and update your total pricing. This feature is especially useful for charges that tend to change often, such as fuel surcharges.

Price modifiers are easy to setup, maintain, and understand.

To create a price modifier, enter the **Prices** area and select **Price Modifiers** as the view:



Click the **New Price Modifier** button in the upper left-hand corner to open a new price modifier.

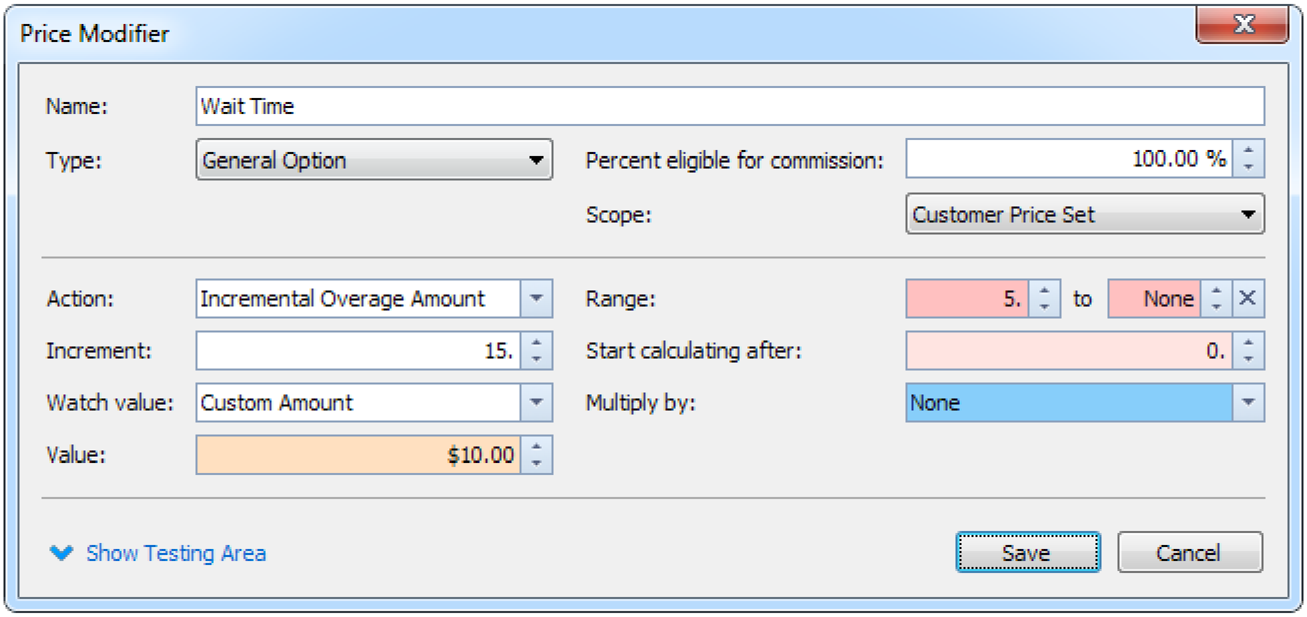
- Enter a **name** for the price modifier. This name will appear to customers and dispatchers under the heading *service levels*.
- Choose the price modifier's **type**. This option will usually be set to **General Option**.
- Set the category to Customer Price Set.
- Leave the **Percent of base price eligible for commission** (the amount of the service level used to calculate workers' commission) at 100% for now.
- **Action** indicates the type of calculation that will be used to determine the price. More information on these types of actions is available later in the Price Modifiers section of Chapter 4.
- The **increment** box will be enabled if the modifier's **action** is set to an incremental type, which specifies what the increment will be when counting. This value will usually be one (1) to count 1, 2, 3, 4, 5 ...
- If appropriate, set the **watch value** to indicate the field to be used in the calculation. More information on these types of actions is available later in the Price Modifiers section of Chapter 4.
- Set the **value** (the amount to charge in the calculation) for the modifier.
- Thresholds and ranges may be set using the "**start applying after**" and "**stop applying before**" boxes (when the modifier's action is set to an overage type). The "**start calculating after**" box allows the amount at which the pricing calculation should start to be specified. This option is useful when the range of pricing is different from the amount that you want to start calculating from.
- If the modifier's action is set to an incremental overage type, the system will automatically access the **value** amount over and over again based on the input specified by the **watch value**. In some cases, an additional set of multiplication must be involved. In such cases, set the **multiply by** field. Unless 2 sets of multiplication must be done, we recommend leaving the **multiply by** field set to **none**.

EXAMPLES:

A price modifier that will charge a customer if the driver is required to wait before a package is ready for collection:

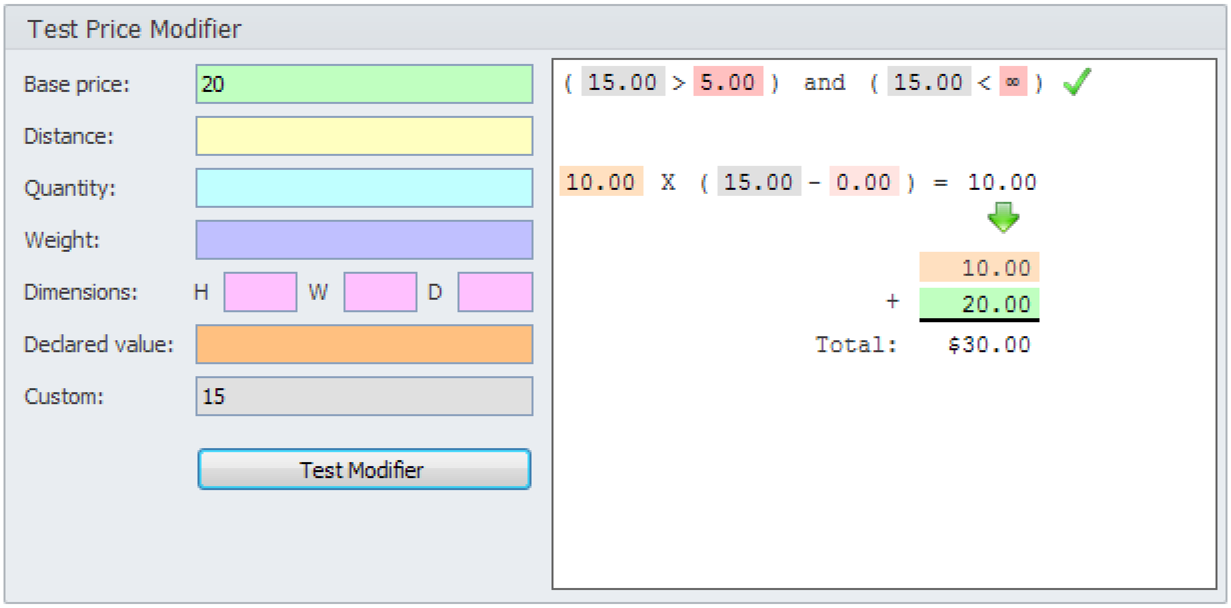
In this example the first 5 minutes will be free, and $10 will be charged for every 15 minutes that the driver waits.

Here is what this example modifier would look like:



Notice that the watch **value** is set to **Custom Amount**. This selection will allow an exact time period to be entered.

Here is a test of the modifier with the assumption that the order has a base price of $20 and the driver waited for 15 minutes total:



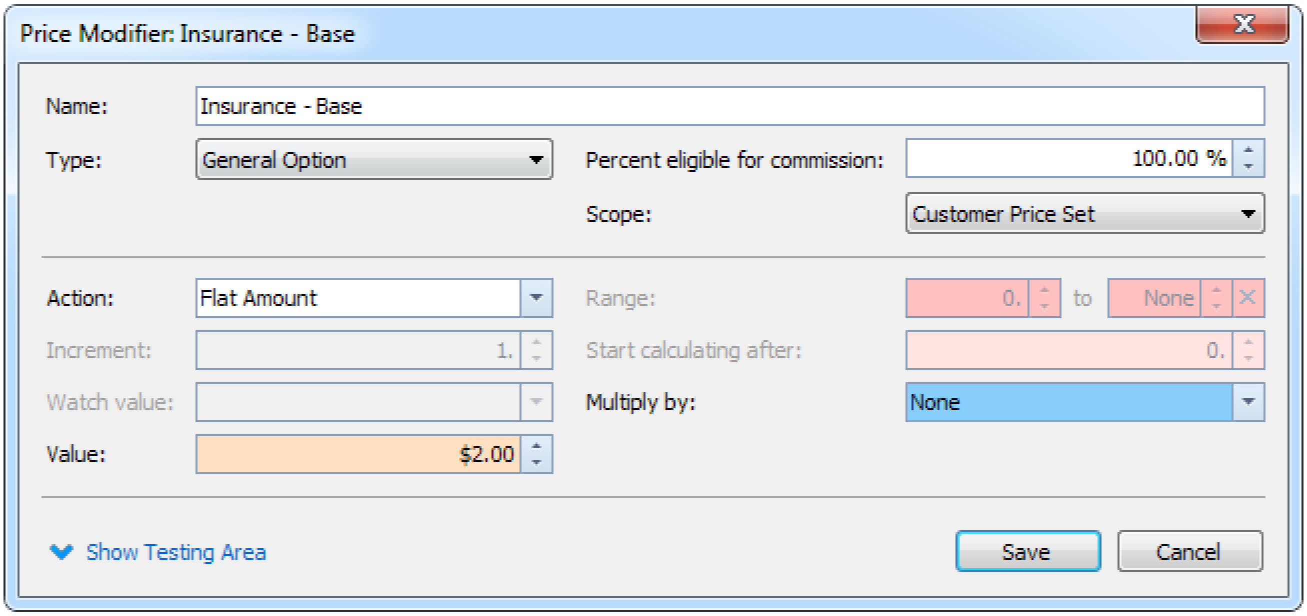
The charge is correctly calculated at $10, plus the base price of $20, for a total of $30.

Let's consider a more sophisticated example with grouped price modifiers. In this example, we'll use a charge for insurance. Here's the pricing formula:

Minimum charge of $2 for insurance, covering up to $100 of declared value after which the charge is $1.25 per $100 of declared value.

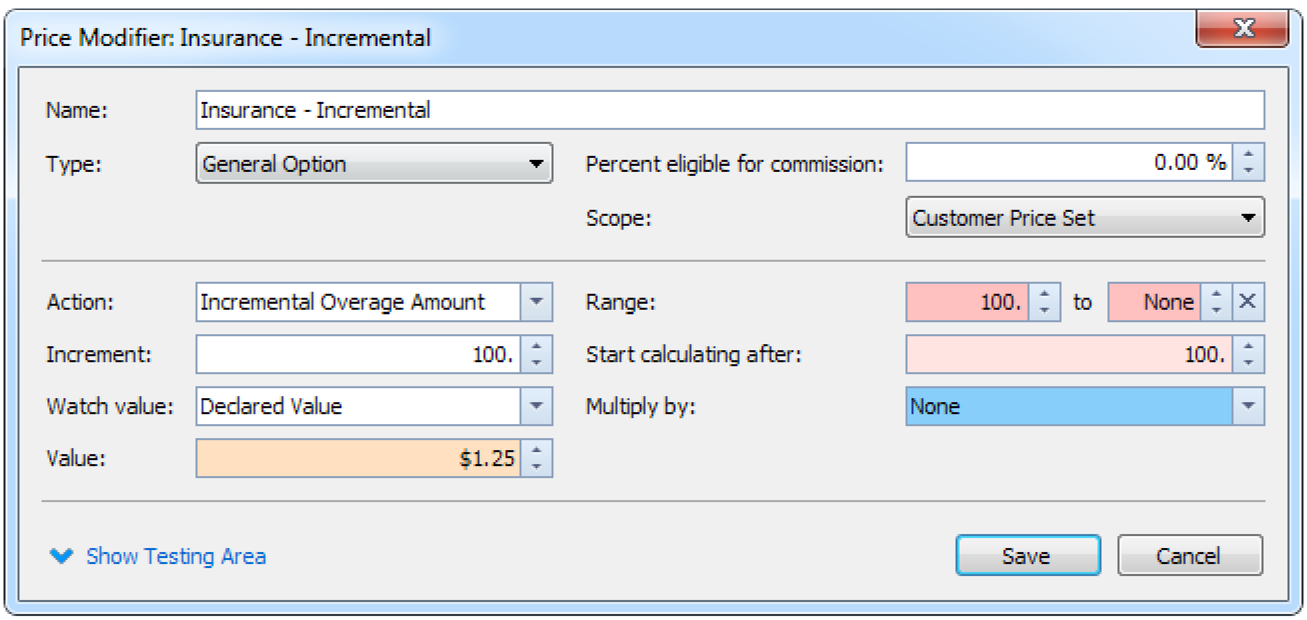
In this case we will need two modifiers: one to define the $2 minimum charge and a second to calculate the additional $1.25 charge.

Here's what the $2 minimum charge modifier would look like:



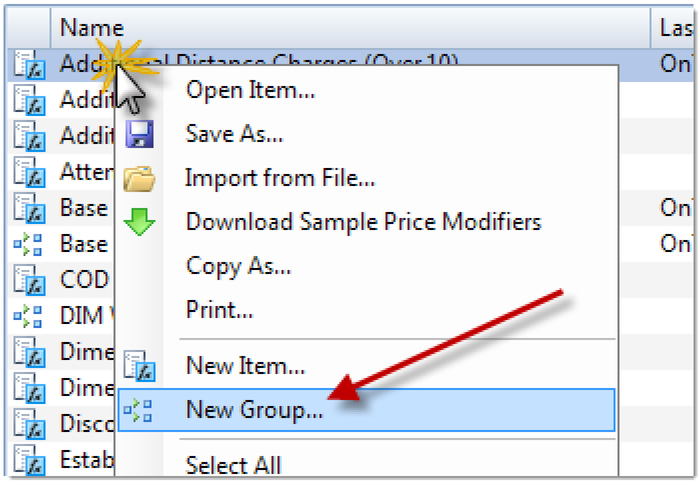
Notice that a flat amount type is used with a $2 value.

Here is the modifier that defines the $1.25 charge:



We are telling OnTime to examine the declared value on the order, and to only start accessing this charge if the declared value is over $100. If so, then we want OnTime to count in $100 increments, charging $1.25 for each one. We also request that the system starts this calculation after $100, including the $2 charge.

To group these two price modifiers together, we will right-click inside the price modifiers list and choose **New Group**:



In the resulting window, we drag and drop the two modifiers we just created: “Insurance – Base” and “Insurance – Incremental” from the list on the right to the list on the left.

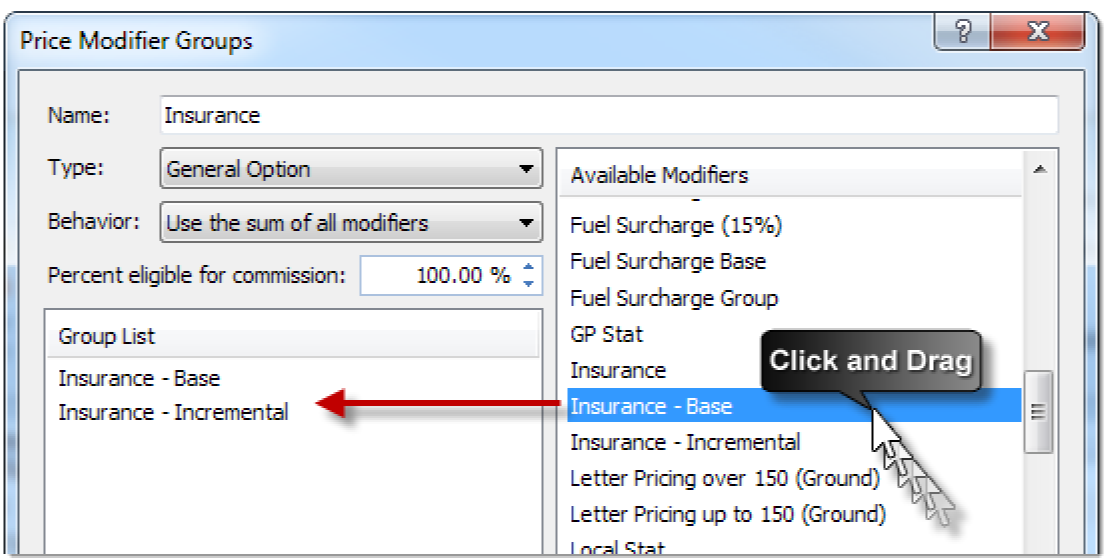
We’ll use the **name** of “Insurance” to allow customers to easily understand what the charge represents.

The type will be a general option.

The **behavior** will be **use the sum of all modifiers**. This specification will tell OnTime to calculate each modifier in the group and add up the results.

The **Percent of base price eligible for commission** refers to the amount of this price modifier that should be used when calculating commission to workers. We will leave this at 100%.

Here’s the final result:



OnTime will now automatically calculate the pricing for insurance without the dispatcher or customer doing more than filling out the **declared value** field.

Groups may be used to effectively automate entire pricing structures. Groups may be placed within groups, which will allow pricing to be very advanced.

Testing Price Modifiers

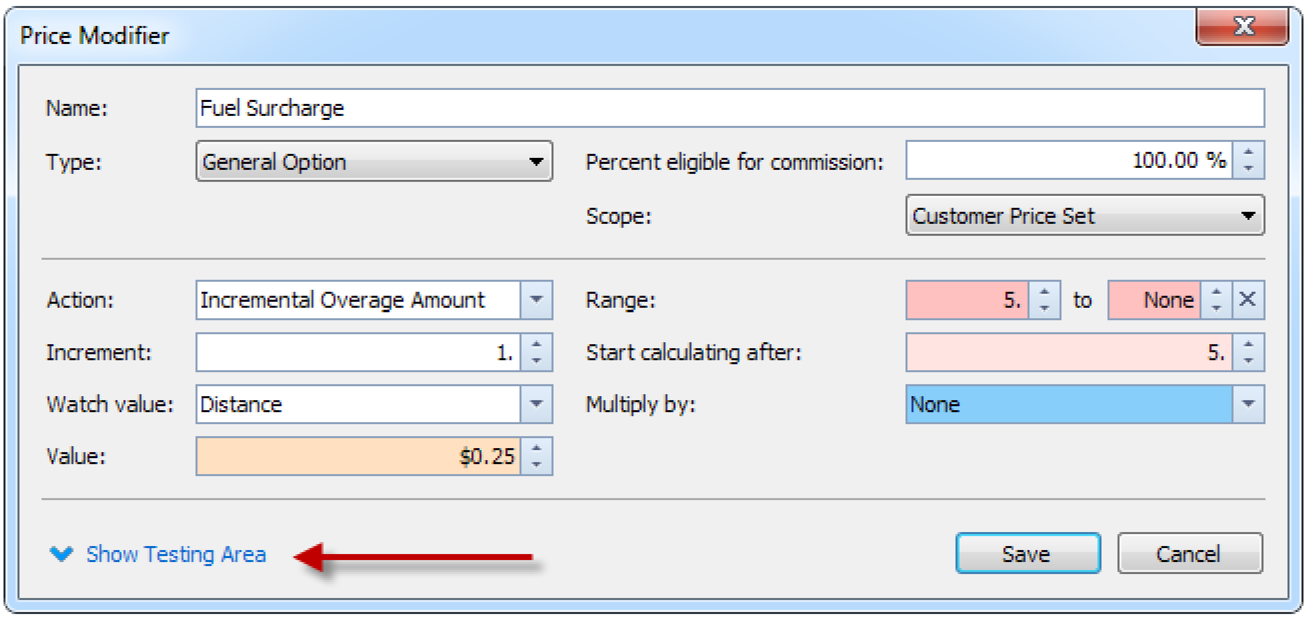
Do not leave the testing of pricing to customers. OnTime includes a testing area to help to ensure modifiers are calculating as expected.

To test a price modifier, fill out the fields required. For instance, to test a fuel surcharge, fill out the base price and mileage fields. Clicking the **Test Modifier** button will display an alert that details which fields need data included for the test to properly run.

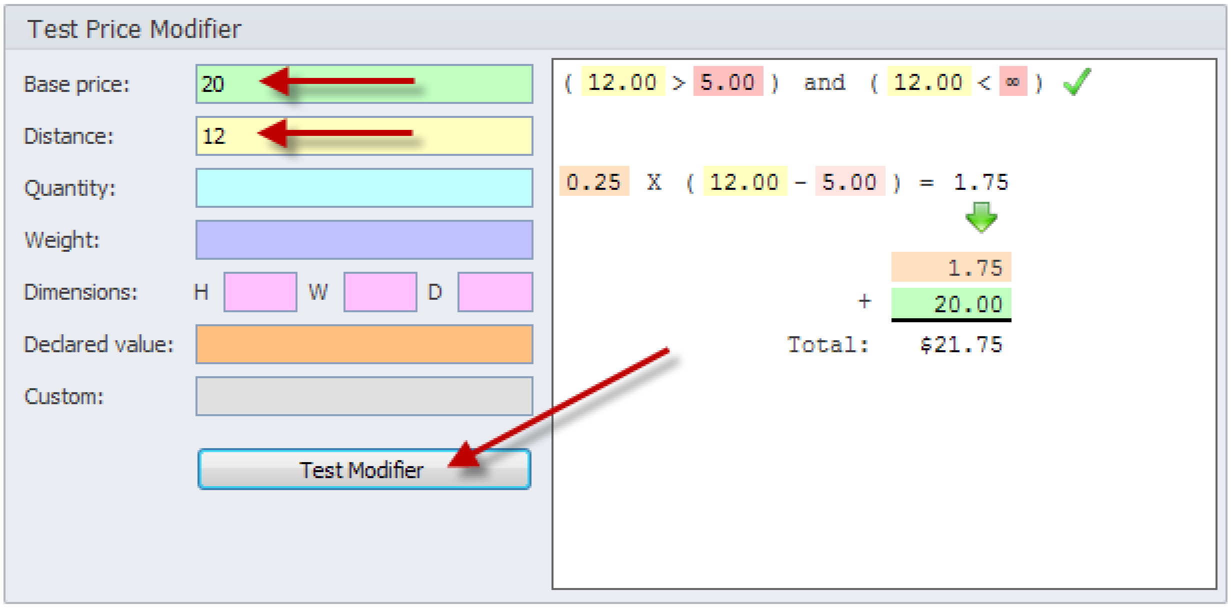
EXAMPLE:

Testing a fuel surcharge that adds $0.25 per mile for every mile driven over 5 miles:

To test, we'll click the button to show the testing area:

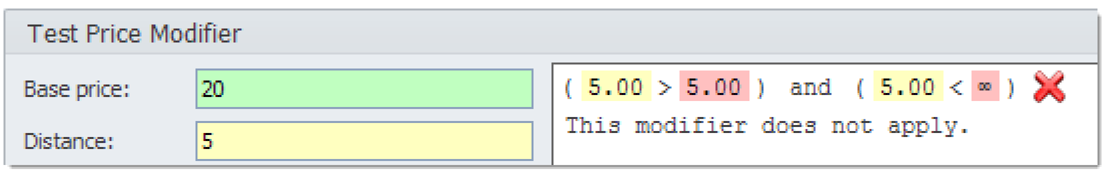


In the testing area, we indicate that the base price of the shipment is $20 and that the distance driven is 12 miles. After filling out those fields we click the **Test Modifier** button and view the results:



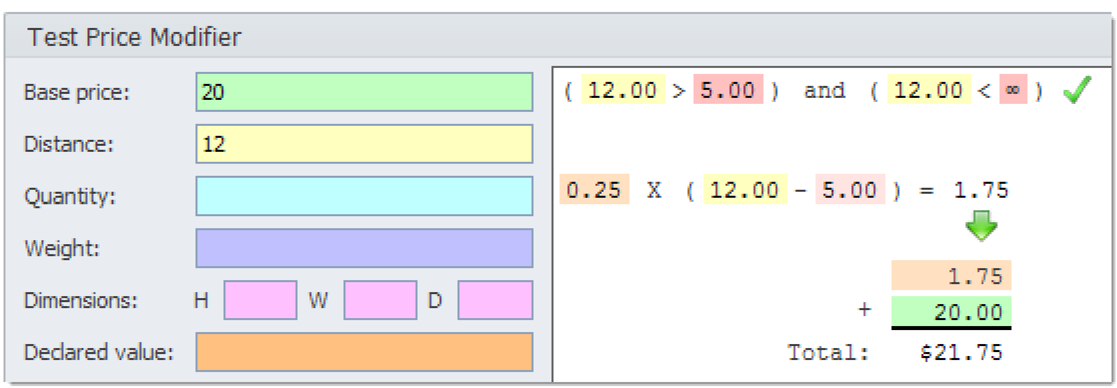
The results are shown on the right-hand side. The first line indicates whether the modifier applies: if so, a green checkmark appears indicating that the 12 miles is greater than the 5 mile threshold.

If we enter 5 miles in the test, the results change:



Because a distance of 5 miles is outside of the range specified for this modifier, this value will not apply and OnTime returns a price of $0.

Returning to the previous example of 12 miles:

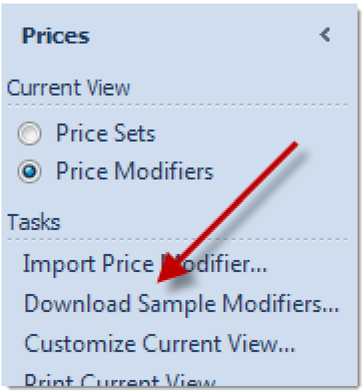


The results detail how the price of the fuel surcharge is calculated. Different values are color coded to display how the numbers are used; offering insight into the way OnTime calculates price modifiers. We can experiment with

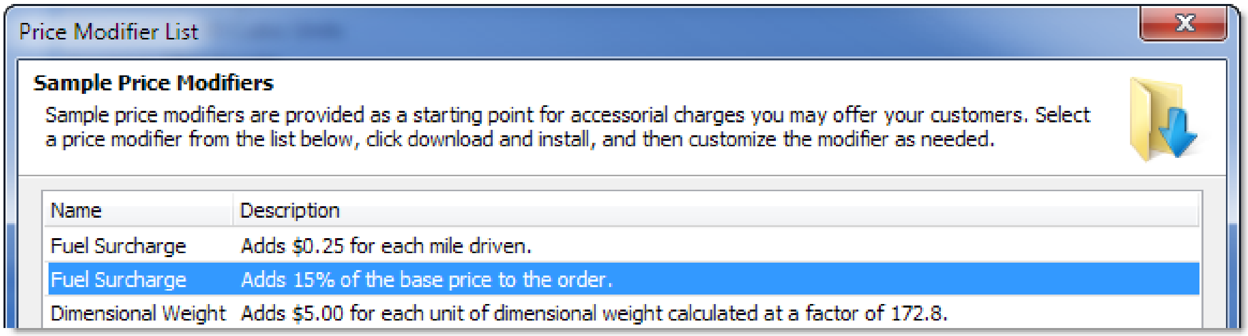
the setup of price modifiers and continually test results until the calculation is perfected, instilling confidence that pricing will work as intended.

Downloading Sample Price Modifiers

Sample price modifiers are provided by OnTime free of charge. Access price modifiers by clicking the **Download Samples Modifiers** link:



Sample modifiers will show price modifiers that may closely match your requirements, helping to understand how the modifiers are constructed, and how to change them to fit specific needs.

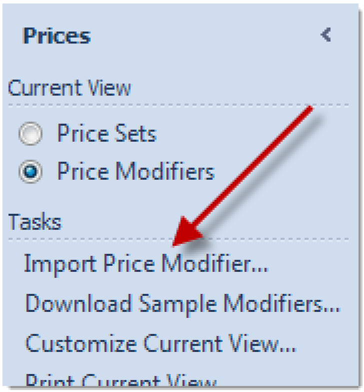


- To preview a price modifier, double-click it in the list
- To download a sample modifier to your list, select the desired modifier and click the **Download and Install** button

Sharing Price Modifiers

Modifiers may be shared with other couriers or saved as a backup by right-clicking the mouse on the desired modifier and selecting **Save As**. Specify a file name and click **Save**. The successfully exported, standalone file may then be sent to others.

To import a price modifier file (OTPM), click on the **Import Price Modifier** link on the left-hand side:



Open the file desired for import to display it in the list.

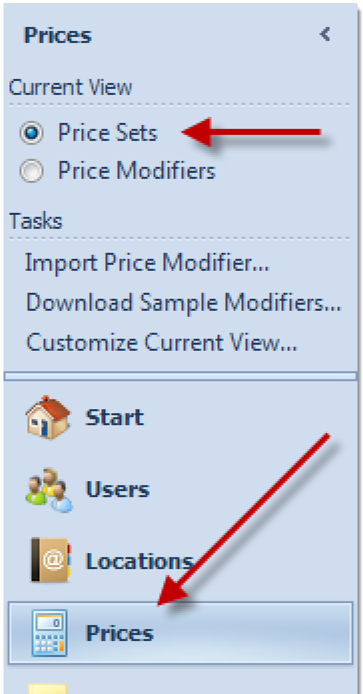
Linking Modifiers to Price Sets

To allow a price modifier to appear in the list of options available under a specific service level, the modifier must be linked to the appropriate price sets. These price modifiers (or options) are separate from base prices, which allow price modifiers to be reused across multiple price sets.

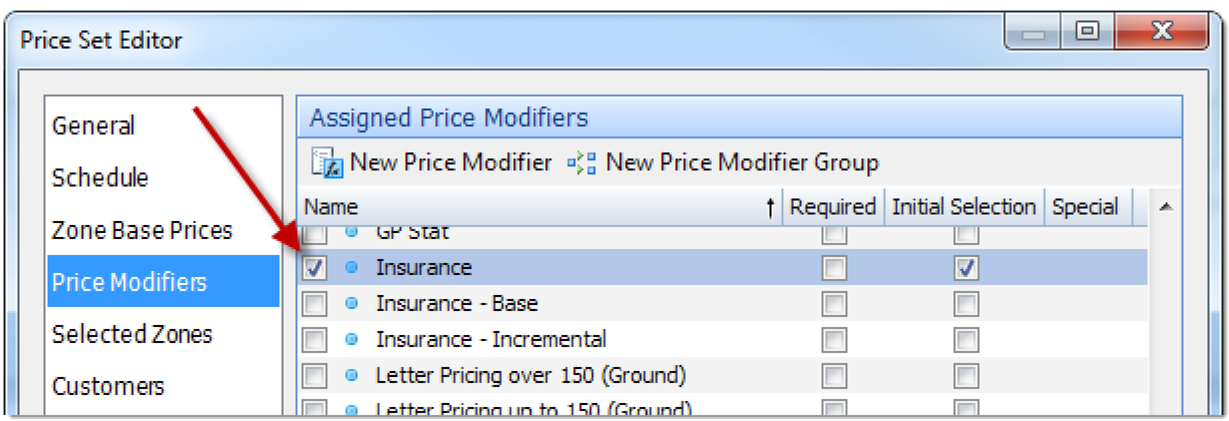
This functionality within OnTime can help to reduce. For instance, if fuel prices were to fluctuate, only the one relevant price modifier would need to be modified for all price sets linked to that fuel surcharge to be updated.

To link price modifiers to price sets:

1. Enter the **Prices** area
2. Set the view to **Price Sets**:

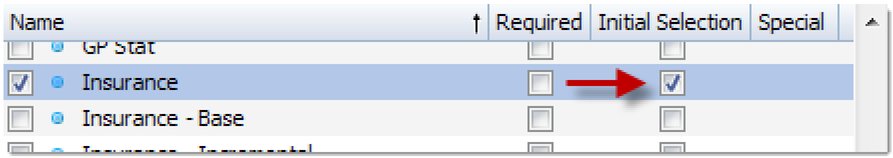


3. Open the price set created earlier
4. Navigate to the **Price Modifiers** tab
5. Locate a price modifier in the list and link it to the price set by checking the box on the left:

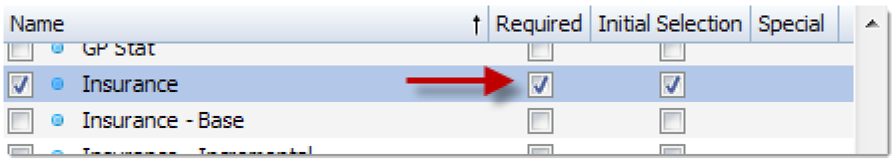


Note: For *price modifier groups*, individual price modifiers do not need to be linked. Link the group itself and OnTime will automatically ensure that the necessary calculations take place.

6. To have an option selected by default (may be unselected later), ensure that the **Initial Selection** box for that price modifier is checked:



7. To make an option be mandatory (always selected), ensure that the **Required** box for that price modifier is checked as shown here:

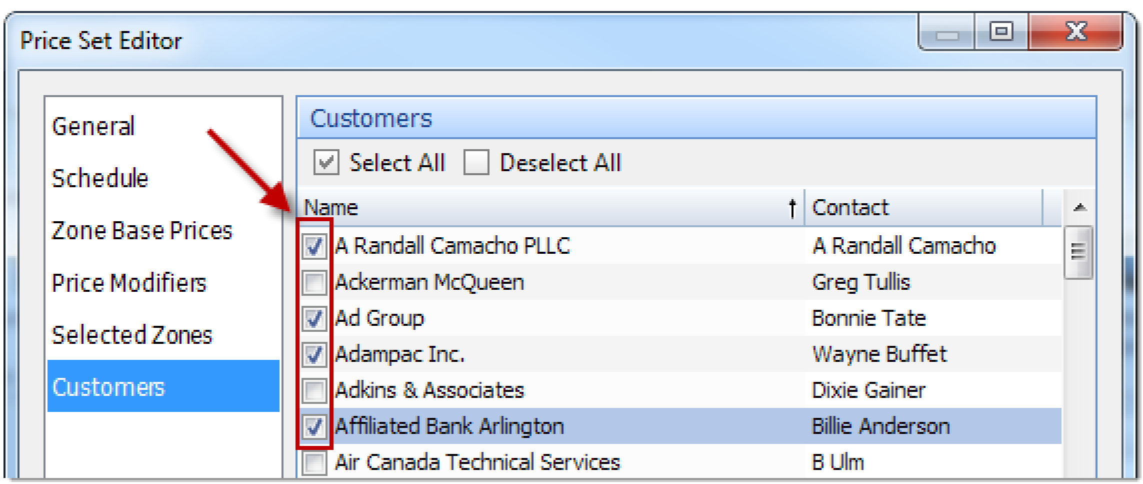


8. Click **OK** to save and close the price set
9. Repeat this process to have these modifiers appear in any other price sets

Linking Price Sets to Customers

OnTime can help to assign price sets to all customers, groups of customers, or individual customers:

- Open the desired price set
- Choose the **Customers** section
- Place a check mark next to the name of each customer to be linked to the price set:



Remember These Steps for Pricing Setup

1. Create a price set
2. Establish the base price
3. Create any necessary optional charges (price modifiers)

4. Link the price modifiers to the appropriate price sets
5. Link the price sets to appropriate customers

Step 5: Setup Notifications

Notifications that go out to dispatchers, drivers, customers, and others can be customized within OnTime. These notifications may contain a variety of information and can be sent out as emails and/or text messages. Notifications may be configured in the OnTime **Workflow Designer**.

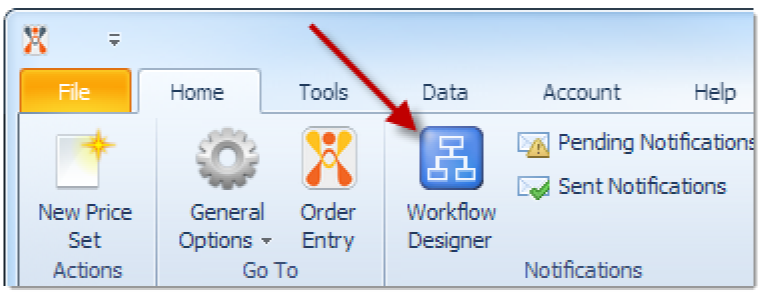
Once it is setup, OnTime Workflow will send out the appropriate notifications automatically 24 hours a day, 7 days a week. No manual intervention is required.

With template messages, the content in the email message will change each time. This flexibility is vital for messages such as proof of delivery (POD) notifications where the date, time, and recipients name must be dynamic.

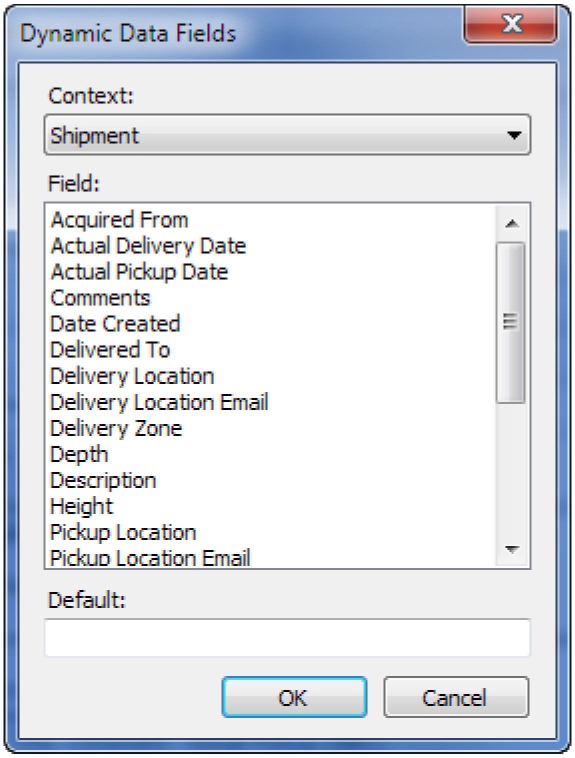
OnTime Workflow creates templates by offering **special fields**. These **special fields** are inserted into the message as placeholders and then substituted with the actual information from the shipment before being sent.

To Create a New Workflow Action

1. Go to the **Home** tab on the ribbon and choose **Workflow Designer**:



2. Click on the **New** button, which acts as a template for the new notification.
3. Give the notification a **name**.
4. Choose the desired **event** to trigger the notification
5. The **action** indicates the type of notification that should be used
6. **Special fields** may be entered to specify dynamic content within a notification. **Special fields** are enclosed inside of curly braces "{ }". They may be entered in by hand; however, OnTime will automatically enter the fields when the button labeled **Insert Special Field** is clicked. You will receive a dialog that looks like this:



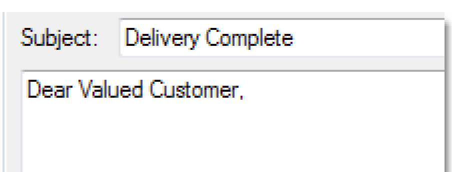
7. Choose the field that contains the information to be inserted into the message.

EXAMPLES:

We are creating a POD for customers and we want to open it with the words:

Dear Valued Customer,

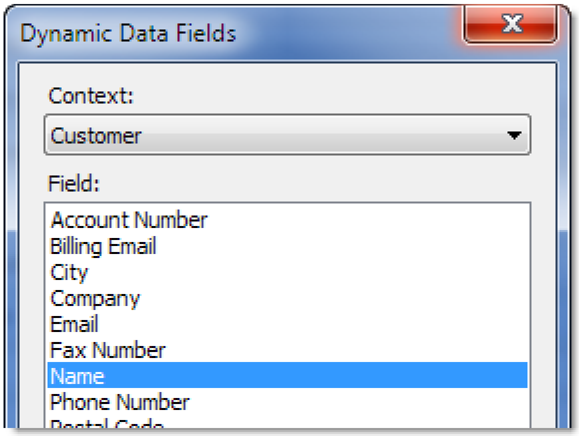
Our message will look like this in the template:



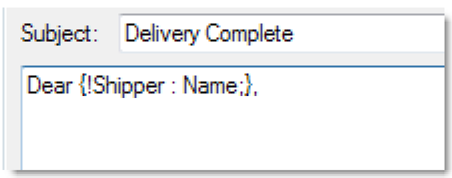
But that is too impersonal; we insert the customer's name so that it reads like this:

Dear Fred Smith,

In that case, we will insert a special field like this:



We changed the **Context** to **Customer** to locate the customer information associated with the order. From there we select the **Name** field, which indicates the primary contact's name at that company. Our message changes to this:

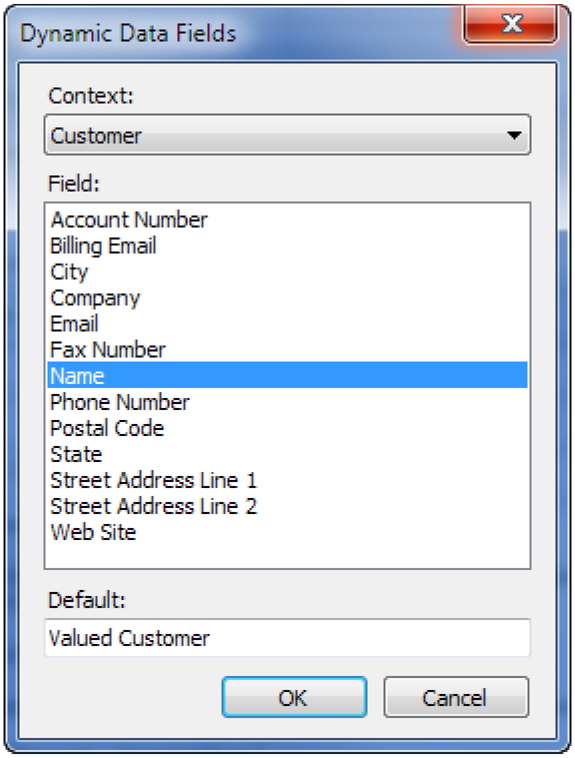


We could leave it at that, but what if we don't have a contact name for a customer? The notification will be missing the name, looking like this:

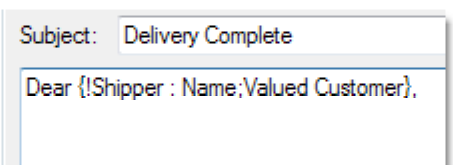
Dear,

Fortunately, OnTime offers a safety net for situations like this where the original data is missing or not available. This safety net is the **default** value.

In the example below, we have specified that the contact name be used, but in case that the name is not available, the default value, "Valued Customer" will be used:



Now our message will contain the special field along with a default value and look like this:



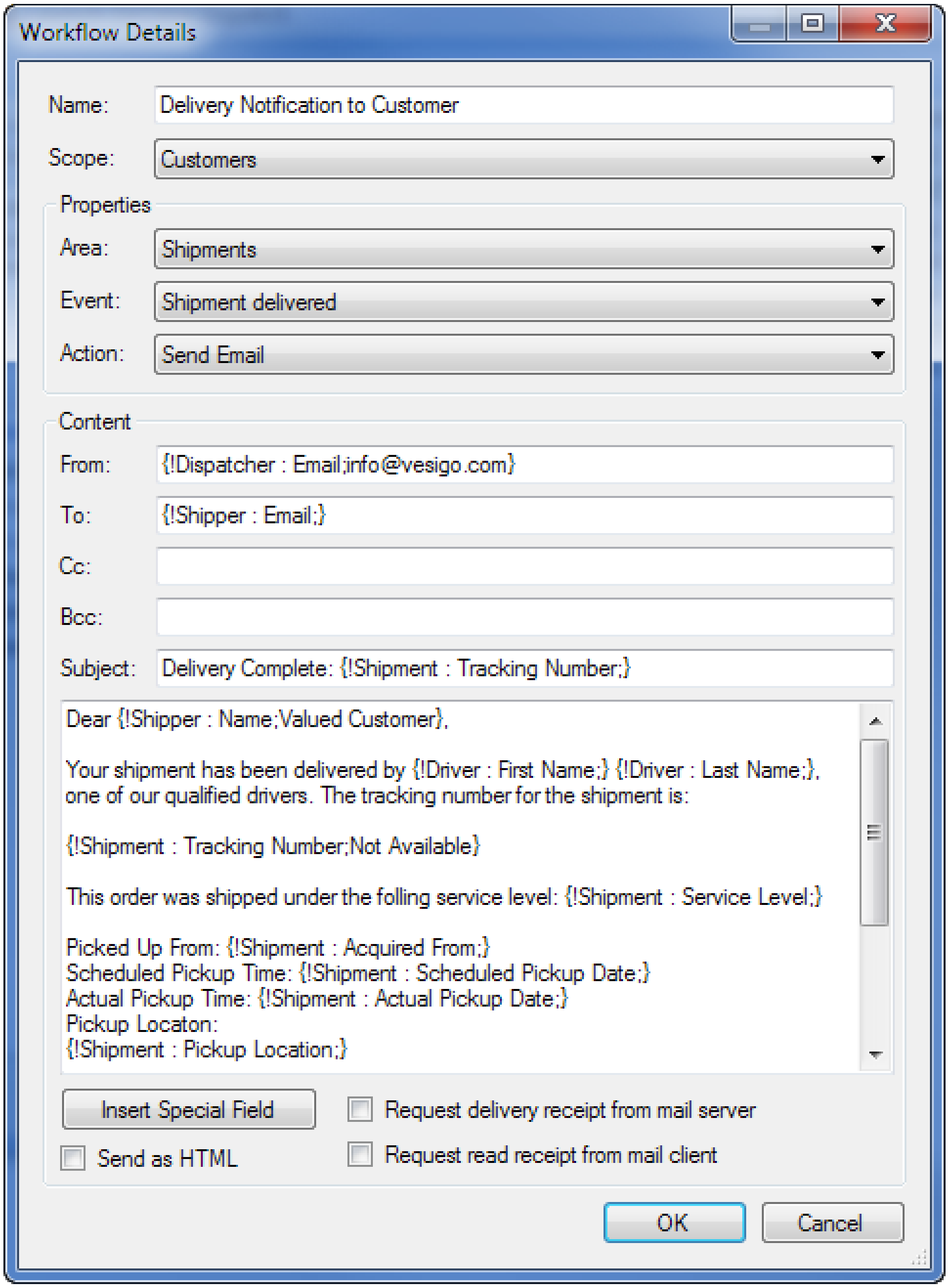
When this message is sent out, when a contact name is available it may read like this:

Dear Fred Smith,

And when no contact name is available, it will read like this:

Dear Valued Customer,

Here is a sample of what a proof of delivery (POD) notification may look like in final form:



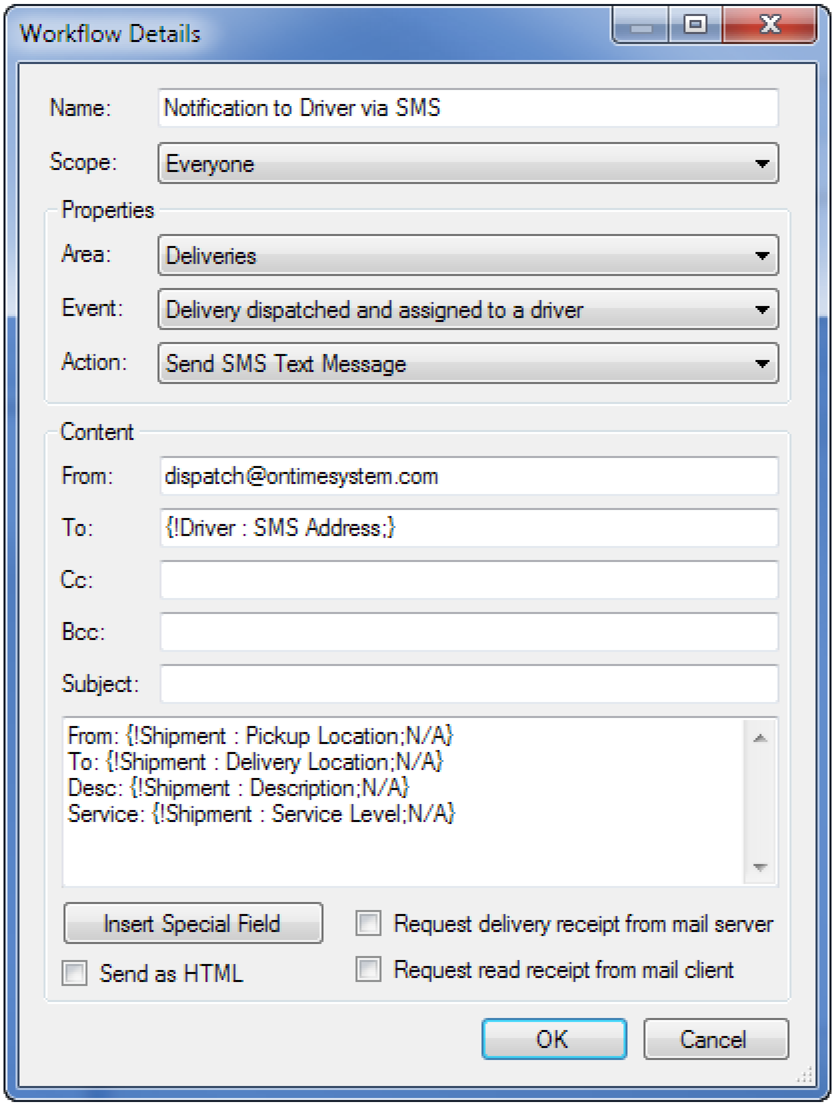
There are thousands of different combinations of notifications that may be created with this workflow system. These **special fields** may be used in any field of the message, including the **From**, **To**, **CC**, and **BCC** fields.

Setup Driver Notifications

Using the same steps used above (in To Create a New Workflow Action), we can create a notification that will be sent out to drivers every time that an order is assigned to them.

EXAMPLE:

We will send the message to drivers as an SMS text message. Because text messages are usually restricted to 160 characters or less, we'll keep it very brief:

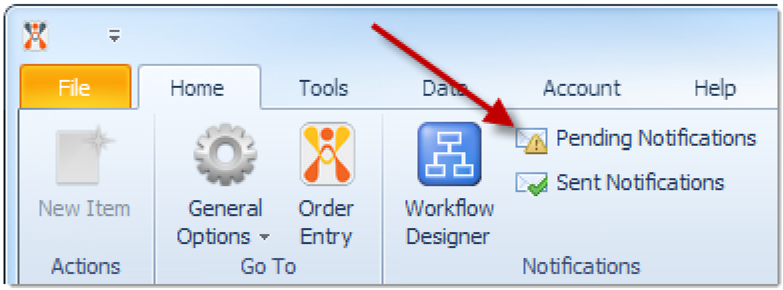


This setup will send a message to the driver's SMS gateway address (email formatted number such as 5553339999@txt.att.net) and will contain limited information about where the shipment is going and what it is.

Once entered, this workflow will activate every time a driver is assigned to a shipment and the message will go out only to the driver being assigned.

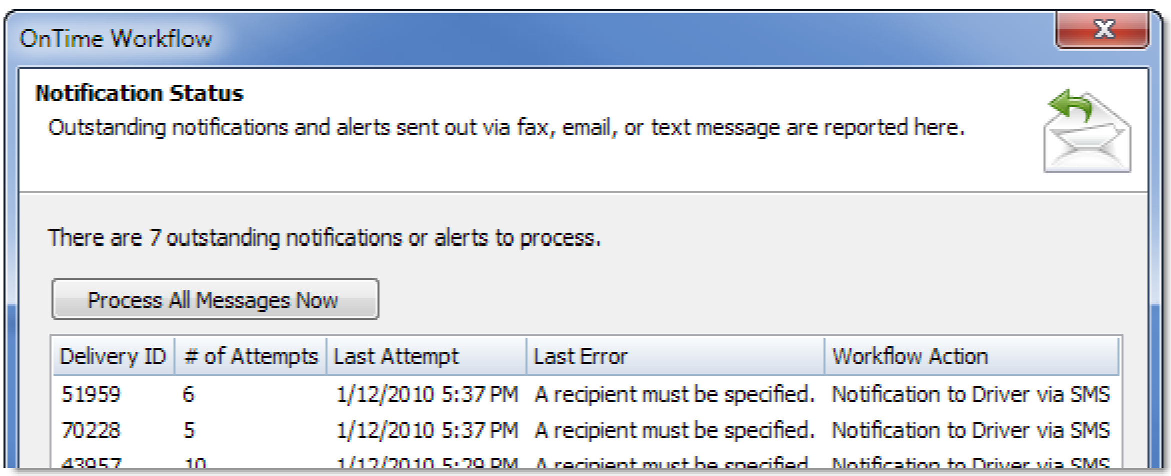
Checking the Status of Notifications

Because OnTime Workflow allows thousands of notifications to be sent automatically throughout the day, sometimes messages may have problems preventing them from being sent. Any and all issues with mailing notifications are listed under **Pending Notifications**, available under the **Home** tab of the ribbon:



This window will show any problems with messages including:

- The order involved
- The number of times the message attempted to send
- The error encountered when sending
- The workflow action (or notification) involved

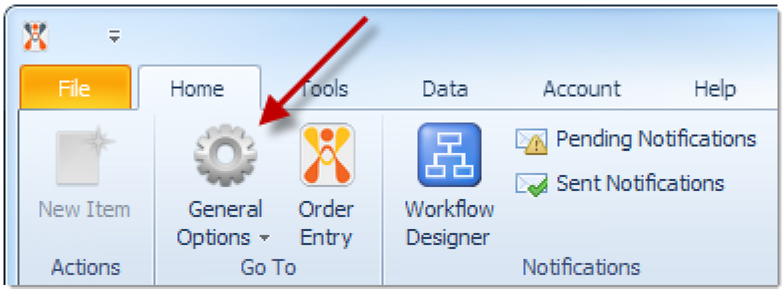


By default, OnTime will immediately attempt to send the message 10 times; if these attempts are unsuccessful, the message will be attempted once an hour.

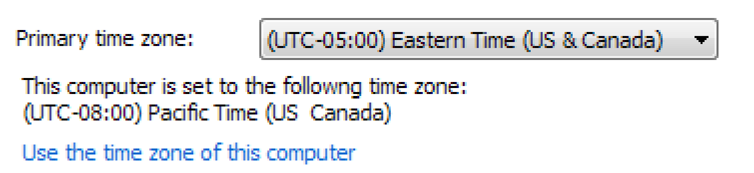
Once the error is corrected, forcibly resend all the messages in the queue by clicking the **Process All Messages Now** button. To remove a message from the queue and ensure that delivery attempts are no longer made, right-click the desired message(s) and choose **Remove Item**.

Step 6: Configure Company Settings

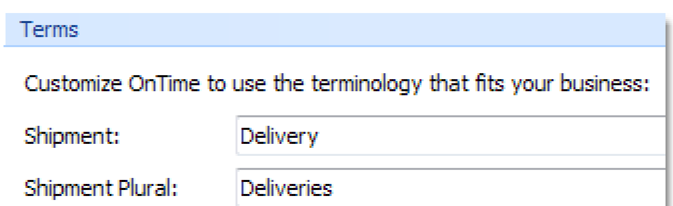
Most company settings can be found from *OnTime Management Suite* under the **General Options** button in the ribbon:



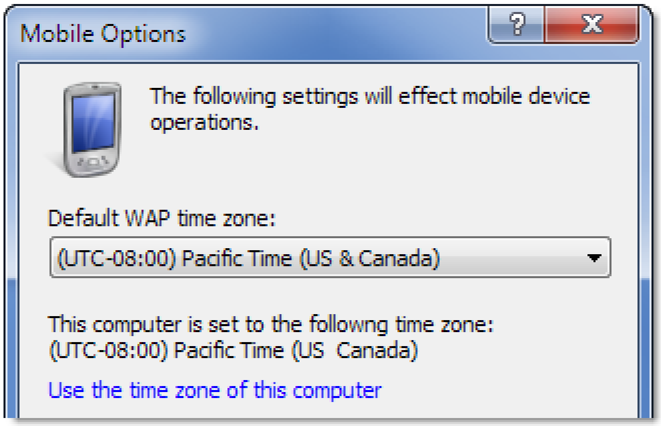
- The business information specified in the **General** section is used throughout the system. Most notifications will fail if the email address is unspecified.
- Set the **primary time zone** to the local time zone. Click the link labeled **Use the time zone of this computer** to quickly make the change:



- Under the **Order Entry** section, choose how to generate tracking numbers. By default, random numbering is used, but sequential tracking numbers may be selected instead.
- Enter the **Terminology** section to make some changes to default terms such as shipment, package, or customer. Be sure to enter and capitalize the singular and plural forms. For example, to change the term shipment to delivery, enter:



- Setting the default time zone for drivers connecting with mobile devices will allow the correct dates and times to be displayed in *OnTime Mobile*. This setting may be altered by selecting the **Home** tab from the ribbon and clicking the **Mobile Options** button.


Mobile Options
The following settings will effect mobile device operations.
Default WAP time zone:
(UTC-08:00) Pacific Time (US & Canada)
This computer is set to the followng time zone:
(UTC-08:00) Pacific Time (US Canada)
Use the time zone of this computer

Step 7: Test, Test, Test

All configurations within OnTime should be thoroughly tested before being made available to customers and teammates.

We recommend passing several orders through the system in order to ensure that:

- Dispatchers and drivers have the information needed
- Notifications are sent out properly
- Pricing works as expected
- Customers have a good experience
- Billing flows smoothly

The following sections explore some suggestions to ensure that these primary areas are tested.

Testing Dispatcher Tasks

- Test that the dispatcher will be able to log into *OnTime Dispatch* using his user name and password
- Setup the dispatcher with an email address in their user account profile. Several areas of OnTime depend on sending out messages from dispatchers and require a return email address. Use a common email address if all dispatchers will be sharing a common address.
- Have dispatchers try entering in a few orders to ensure they are comfortable with the process of submitting new orders.

Testing Driver Tasks

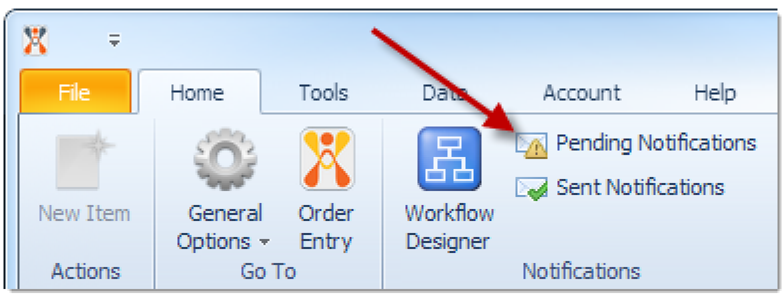
- Test that the driver will be able to log into *OnTime Mobile* using his user name and password. If the mobile device that the driver is using is available, try installing the application and logging in as the driver on that mobile device.
- If SMS text messages will be used to send notifications to drivers, ensure that each driver has the **SMS Gateway** field filled out (under user profile) with the address for the applicable mobile device. If that field is not filled out properly, the driver will fail to receive automated notifications.
- Try to send a few notifications and check if the driver properly receives the tests. Do this before sending the driver out into the field.
- If the driver will be in a different time zone than the company's primary time zone, set the time zone under the driver's user profile. Otherwise times and dates may appear inaccurate for that driver.
- Test the compatibility of devices with *OnTime Mobile*. Some mobile devices support digital signature capture and GPS, while others do not. Be sure that the devices you use will be compatible with whichever features are most important to your company. For detailed information regarding compatibility, contact OnTime Technical Support.
- Provide some time for drivers to become familiar with the flow of the *OnTime Mobile* software by passing a few test orders through the system.

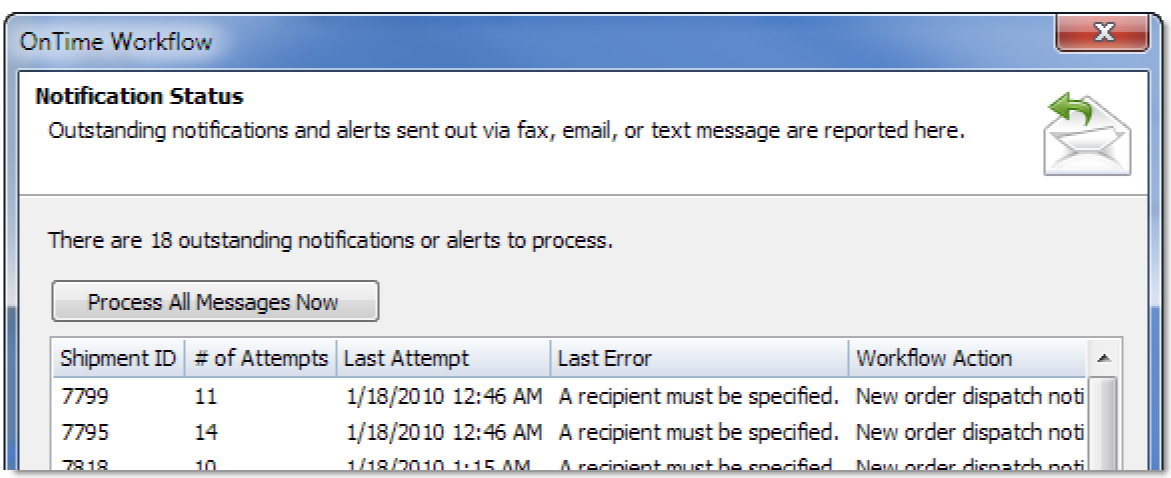
Note: If tracking time and activity of drivers will be important to your company, ensure that drivers are using the time clock features responsibly. If the driver is not clocking in and out, OnTime will not be able to accurately determine their activity.

Testing Notifications

Notifications are setup primarily under the OnTime **Workflow Designer**. This method offers a very flexible and powerful approach to sending notifications; however, that flexibility can leave room for mistakes.

- Use default values where appropriate. That way if the information in the special field is not available, the default can be used, which is especially important when addressing the “from” and “to” fields in an email or text message.
- Check the notification status window occasionally to ensure that all notifications are going out properly. Any problems will be shown there along with hints as to what the problem may be.





- Try putting your email or text message address in the CC or BCC fields of the workflow notification. That will help ensure that the content going out to customers or drivers is accurate, because you will receive a copy each time. Once you are confident in the reliability of that notification, simply remove your address from the CC or BCC fields.

- When using SMS text messaging or paging to send to drivers, check with the mobile provider for any additional charges that the driver may incur for text messages received. If you plan on using this method frequently, drivers should have unlimited text messaging plans, eliminating the possibility of overage charges from the mobile providers.
- Sometimes a notification may be delayed before going through to the recipient. There can be many reasons for this, including networking congestion with the mobile provider.

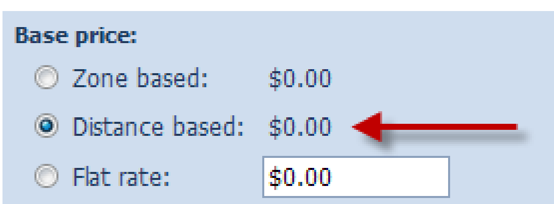
Note: Typically there can be anywhere from 0 to 5 minutes before a notification is received by the recipient. If you have delays longer than that, contact your mobile provider.

Note: Mobile providers do not always guarantee that a text message sent to a mobile device will actually get there. It's always a good idea to call and confirm an important assignment with your driver rather than relying solely on a text message.

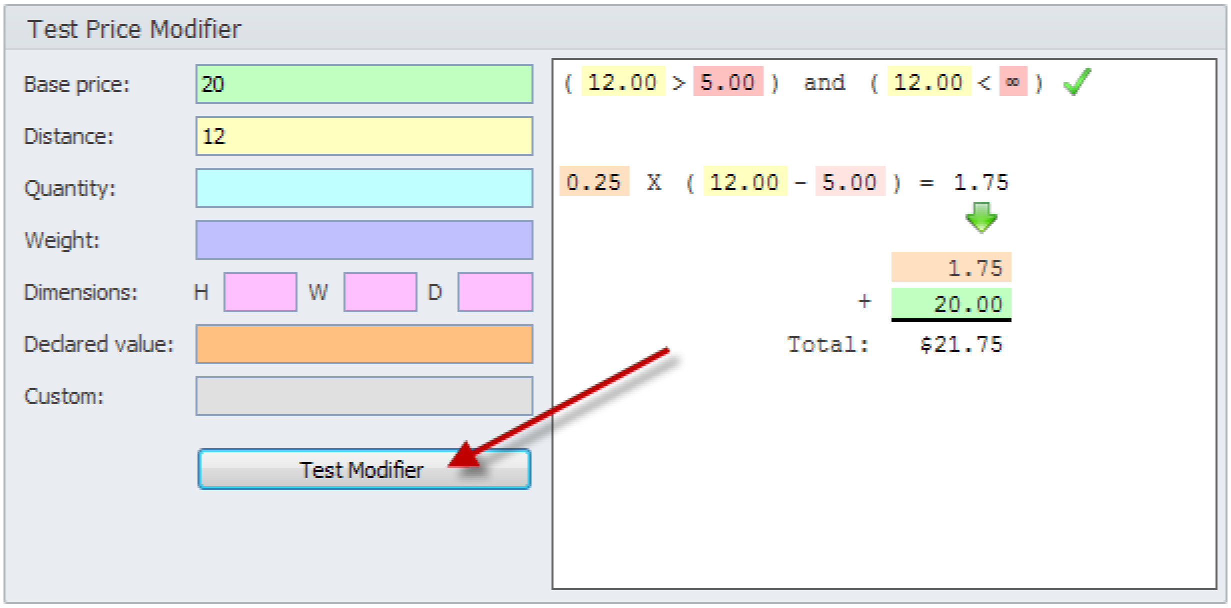
Testing Prices

OnTime offers the most powerful and flexible pricing engine in the courier software market. Be sure to test out pricing to ensure that the different specifications customers may require are possible.

- When using zone-to-zone pricing, make sure that locations entered into OnTime are associated with a zone. If locations are left unassociated, the postal code from the location will be used to match a zone, decreasing the accuracy of pricing.
- When using distance based pricing, make sure that the price set has been properly configured to use a distance based price modifier. If the price set is not configured, the distance base price will appear as $0.00, no matter the distance.



- Accessorial charges, or price modifiers, have a testing harness included. Several different scenarios may be simulated to test the modifier's evaluation.

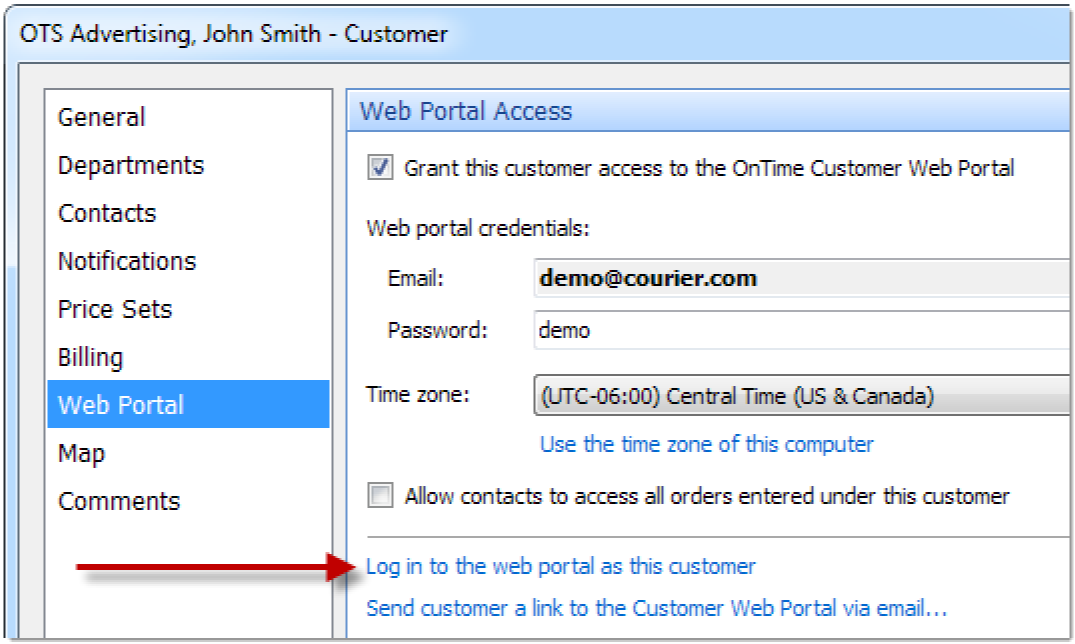


Testing a fuel surcharge price modifier

- Create a test customer for and then link that customer to the price sets are being tested. Then, using the *OnTime Dispatch* program, create new orders while watching the pricing. Altering entries on the order entry form will cause the price to be recalculated. For instance, if you wanted to test your distance rate, just adjust the distance field up and down to see how the price will be affected.
- Try submitting a few of these test orders into the system to ensure that pricing continues to operate as intended.
- Test pricing structure by creating test orders in *OnTime Dispatch* to start simplifying pricing. Removing redundancies and excess options from order entry will help customers and dispatchers to better use and understand pricing.

Testing Customer Tasks

- Create a fake customer for testing purposes. Use this customer to test pricing and other configurations before allowing access to real customers.
- When adding a customer to OnTime, be sure to double check their pricing and billing options. You don't want to give the wrong rates to the wrong customer by accident.
- When adding a customer that will have access to the *OnTime Customer Web Portal*, always try logging in as that customer to ensure that everything is setup properly. The easiest way to do this is by clicking on the link shown here:



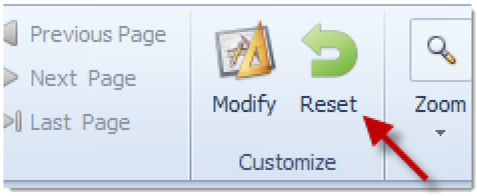
Logging in as that customer gives you the opportunity to see exactly what your customer will see. In the web portal, try entering in a few test orders to ensure that the pricing and options are clearly described for the customer. Dispatchers and customer support representatives who do this test often become familiar with the customer experience on the Web Portal and can provide optimal customer support.

Testing Billing

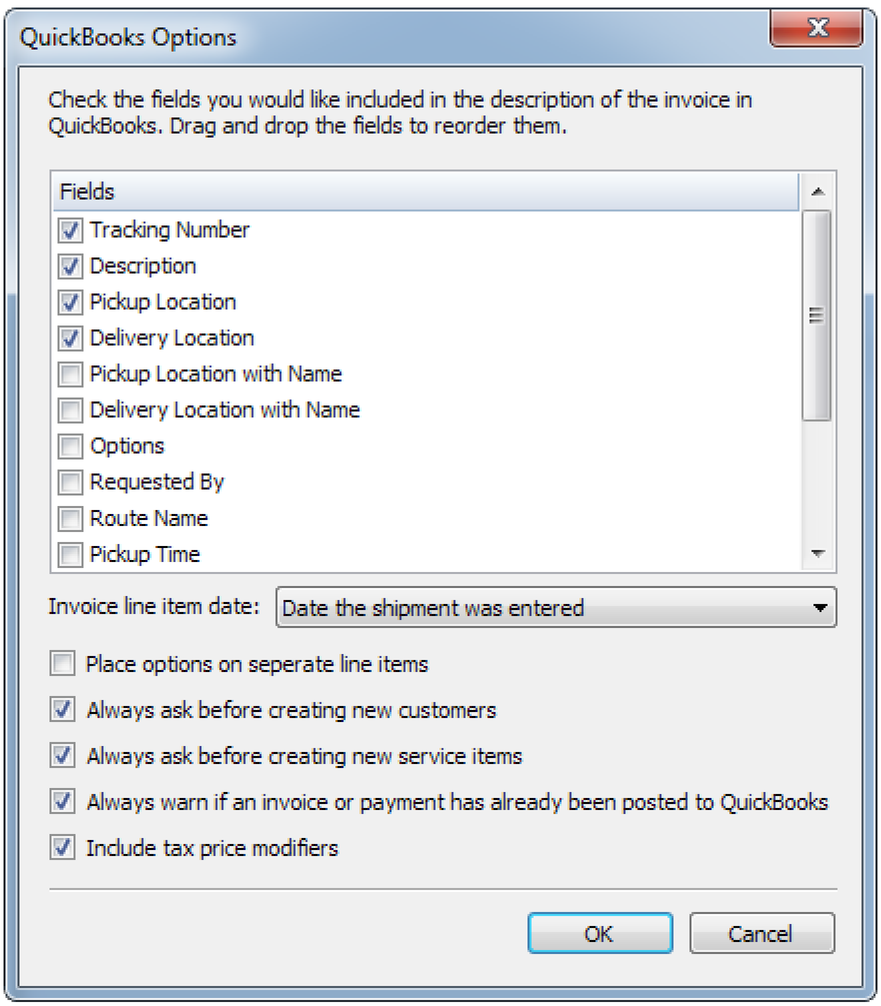
An important part of every business is the billing of customers. If the pricing structure has been well tested, billing will likely go smoothly; however, if the pricing structure is complicated to begin with, invoices may be difficult for customers to understand.

Here are some tips to ensure that billing goes smoothly:

- If customers are on different billing cycles, setup their schedules as soon as possible. OnTime cannot know a customer's billing cycle until it is defined.
- Print an invoice to check if visual customization is desired. If so, make the desired changes in the Report Designer.
- Invoices, by default, should print out so that the address displays through a #10 windowed envelope. If you need to use a different envelope type or will be printing the invoices on pre-printed forms, customize the invoice's layout (using the Report Designer) and test to ensure print layout is correct.
- To reset an invoice back to its original state, click **Reset**:



- If payments will be processed through OnTime to track customer balances, enter the payment received in OnTime. The connection with QuickBooks will not pull payment information from QuickBooks into OnTime. OnTime will only push payment information out to QuickBooks.
- Test OnTime's connection to QuickBooks by sending a few invoices or payments over. Verify in QuickBooks that the information (invoice or payment) has been properly entered.
- To have information from invoices sent to QuickBooks in a certain manner, configure the options:



- Create a test customer and attempt to test the emailing, printing, or faxing of invoices to that customer. *Note: Faxing incurs an additional fee to use.*

To inquire about a specific testing issue, feel free to call OnTime Technical Support for assistance before putting the system online.

Congratulations, You're Set Up!

We've covered the basics of getting OnTime setup for your company and you can start using it in your operations:

- Step 1: Add Users
- Step 2: Add Locations and Zones
- Step 3: Add Customers
- Step 4: Configure Pricing
- Step 5: Setup Notifications
- Step 6: Configure Company Settings
- Step 7: Test, Test, Test

Remember, there are hundreds of other features in OnTime that you'll discover over time. The remainder of this user guide explains most of those features in detail.

Chapter 4: OnTime Management Suite

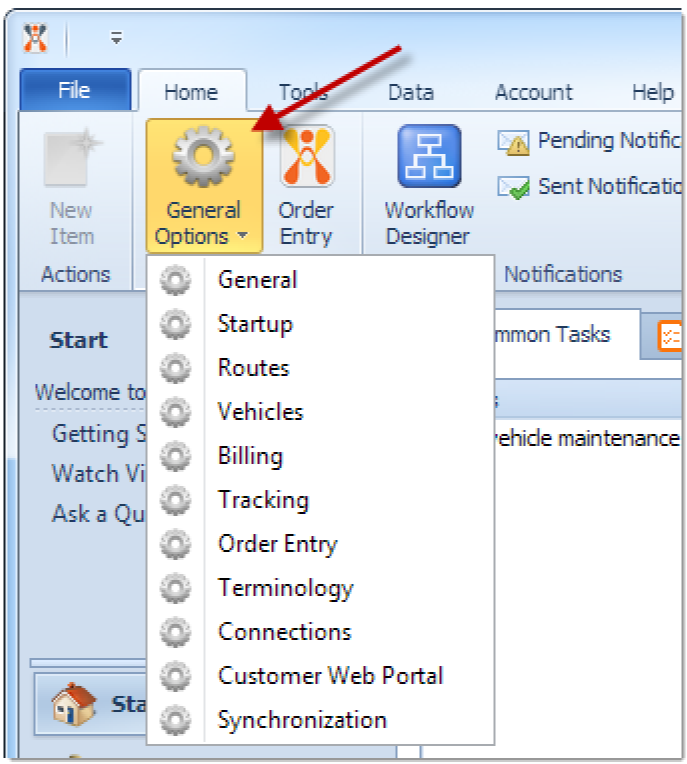
OnTime Management Suite is the application used by managers to administer the OnTime company account. This chapter contains information about the features and functions in *OnTime Management Suite*.

Configuring Preferences

Most preferences are controlled from within *OnTime Management Suite*. The following sections will discuss these areas.

General Options

The general options area allows for the modification of multiple OnTime preferences. Many of the settings altered within the general options area will affect every user in OnTime. To access the general options section, click the **General Options** button under the **Home** tab of the ribbon:



A drop down menu will appear with shortcuts to several categories of settings. We'll start with **General**.

General

Fill out the **company information** accurately; these values are used throughout the OnTime company account. The email address will oftentimes be used as a return address for notifications and alerts. If the email address is missing or invalid, messages may fail to send.

Set the **primary time zone** to the time zone of the business headquarters.

Uncheck the box **play sounds** to silence sound effects when events occur.

To use customized sound effects, click the link labeled **play custom sound when new items arrive** and select a WAV audio file. Return to the default sound effects at any time by clicking the link labeled **use default sound**.

Set the preferences in the **mapping** section. The **mapping service** may be either Google Maps or Bing Maps. The **mapping unit** may be set to either miles or kilometers, whichever is most appropriate. The **country/region** should be set to the most relevant location. The choices are:

- North America and the Caribbean
- Asia/Pacific
- Europe
- Other

The user interface of the program may be adjusted to use different **color schemes**, based on personal preference. Available color schemes are blue, silver and black.

To reset the user interface to its default settings, click the link labeled **reset primary user interface layout**.

Startup

Show Start Page: If this option is checked, the start page will open when the program starts up. If this option is unchecked, the program will display the most recently accessed section of the navigation bar at startup.

Check for program updates: If this option is selected, OnTime will automatically check for available updates and display a prompt when an update is found.

Automatically sign in: If this option is selected, OnTime will automatically log in the same company ID, user name, and password last used to sign in. If this option is unselected, OnTime will allow the appropriate credentials to be entered in for any company or user at sign in. We recommend unselecting this option when using public computers.

Routes

This section contains options pertaining to stops setup in the **Routes** area of *OnTime Management Suite*.

The **automated Route Scheduler** causes OnTime to automatically attempt to schedule all route stops once a day. Set the time of day that the scheduler should run.

> **Note:** New days begin at midnight. Only route stops with schedules that are due to occur *that day*. As a result, a time of 12:00 AM or soon thereafter is highly recommended. A good setting is 1:00 AM.
>
> **Note**: The automated route scheduler checks for adjustments to the time of day every 15 minutes; therefore, settings may take as long as 15 minutes to take effect.

The **user identity** will automatically label orders with a particular user as the creator. All orders generated by the route scheduler will be stamped with this specified user.

A **tracking number mask** defines the format of the tracking number for *route generated shipments*. A tracking number mask may include alpha-numeric characters including symbols such as dashes. The pound symbol (#) is used as a place holder for a randomly generated number, determined by the **tracking number digit length**. This number can be a maximum of 9 digits long. Be sure to use longer tracking numbers that change often to ensure a variety of numbers to pull from.

To manually schedule route stops, click on the **schedule route items** button. A list of routes stops yet to be scheduled for that day will appear. Check the items in the list that should be scheduled and then click the **schedule now** button.

To view the results of either a manual or automated scheduling, click the **view scheduling log** button. The items scheduled, the routes they originated from, and the tracking numbers that were assigned to the shipments will be displayed.

Vehicles

This section contains options that affect vehicle maintenance alerts. The **remind me** option allows for reminders that cause a green flag to appear in the Maintenance Alerts area to be scheduled. Set the number of days and miles to the desired values that match vehicle maintenance policies.

Billing

The **current invoice number** will be shown as a blue link. In OnTime, the invoice numbers are sequential. To seed this number to be a higher value for the next invoice, click on the blue link and adjust the invoice number.

Include older and missed orders in billing cycles: A billing cycle is normally defined as a specific amount of time between two dates. Checking this option will allow OnTime to gather orders into the current billing cycle, ensuring that nothing is missed when invoicing customers.

To preserve the prices in an order, OnTime stores a cached record of the price when an order is created. This dynamic structure protects prices from being retroactively affected by changes. If desired, prices may be refreshed or updated manually from the **Tracking** view; the following two options can automate the updating of prices during the billing process:

Always update prices when preparing invoices: When creating and editing invoices, prices on an order will be automatically recalculated using the current price modifiers and price modifiers.

Always update prices when posting invoices to QuickBooks: When sending invoices to QuickBooks, prices on an order will be automatically recalculated using the current price modifiers and price modifiers.

This section also contains options that affect sending invoices via email. The **email template** button allows access to the template used to send invoices by email. In the main text box, a message may be composed. Special placeholder fields can be inserted:

- **Customer name** will be replaced by the name of the appropriate customer.
- **Contact name** will be replaced by the contact name of the appropriate customer.
- **Report date** will be replaced by the date that the invoice was generated.

Invoices emailed to customers are attached to the message as a PDF file. To instruct the customer about this, select **Adobe PDF Instructions** and a short paragraph describing how to install Adobe Reader will be included in the email.

Tracking

This section contains settings which relate to the tracking view.

Three colors can be defined which correspond to time spans in relation to deadlines:

- **Shipments past the pickup time** will change the color of a shipment's row when the time goes beyond the window for picking up the shipment.
- **Shipments past the delivery due date** will change the color of a shipment's row when the time goes beyond the window for delivering the shipment.
- **Shipments within *XX* hours of the due date** is a custom field which will change the color of a shipment's row when the time gets to be within the number of specified hours of the latest time in the window for delivering the shipment.

Maximum number of rows to display defines the highest allowed number of rows to be displayed at one time in the tracking view. This option can help to improve OnTime's performance.

Order Entry

Require that dispatched shipments contain a delivery location will require dispatchers using *OnTime Dispatch* to specify both a pickup and delivery address before submitting the order. For on-demand orders, the pickup location is always required.

Apply price set due date offset as: This option applies to the offset in delivery time for price sets. Two options are available:

- **Time between pickup and delivery due dates**: This option will take the amount of time specified in the **offset** and ensures that the latest delivery arrival time (or due date) is later than the latest pickup arrival time by at least the amount specified in the offset.
- **Time inside of pickup and delivery windows**: This option will take the amount of time specified in the **offset** and will ensures that much time exists between the earliest and latest arrival times for both pickup and delivery locations. This option will usually result in the pickup and delivery times being the same, but with a large window of time for each.

Use same day delivery cut off time: This option will cause *OnTime Dispatch* to automatically set the due date of orders to the next day if the time of day is past the specified time of day. Set the **cut off time** to the time of day that you would like this to occur.

Show customer comments: Customer records have a section for private comments, such as notes or instructions regarding the customer. Enabling this option will allow that information to be displayed to dispatchers in the order entry form in *OnTime Dispatch*. These comments are never shown to the customer and will not appear on the *OnTime Customer Web Portal*.

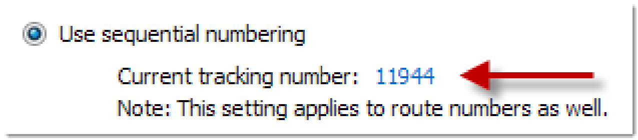
Show location comments: Location records have a section for private comments, such as notes or instructions regarding the location. Enabling this option will allow that information to be displayed to dispatchers in the order entry form in *OnTime Dispatch*. These comments are never shown to the customer and will not appear on the *OnTime Customer Web Portal*.

Configure Required Fields: Click this button to view a list of fields that may be made mandatory. Place a check box next to each field that should be required and then click **OK** to save the changes. The selected fields will be required in *OnTime Dispatch* and the *OnTime Customer Web Portal* before order submission. This option makes global changes. To make fields required for a specific customer only, see the required fields option under that customer's record.

OnTime generates a unique tracking number for each order entered into the system. These tracking numbers can be generated in two ways:

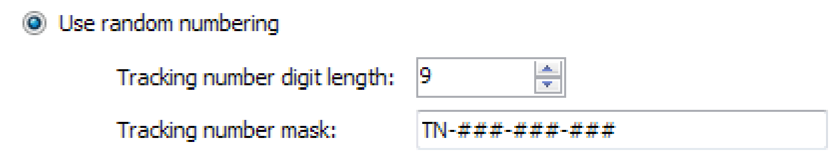
- **Sequential numbering**: The tracking number is a number (maximum of 9 digits) that will always be at least one numeric value higher than the previously generated tracking number. Because unauthorized persons may be able to guess, or predict, sequential tracking numbers, large carriers such as UPS, FedEx, and the USPS do not use sequential numbering.
- **Random numbering**: Each tracking number will be randomly generated. Unauthorized persons will have less than a one in one billion chance of predicting a tracking number with this system. Randomly numbered tracking numbers can be generated faster than sequential numbering, especially in offline scenarios.

If using sequential numbering, the next tracking number may be seeded by clicking the blue link and entering in a number. The next order submitted will use this number + 1.



Tracking numbers may be reformatted to fit individual business needs. The **tracking number mask** defines the format of the tracking number for *on-demand shipments*. A tracking number mask can include alpha-numeric characters including symbols such as dashes. The pound symbol (#) is used as a place holder for a randomly generated number, determined by the **tracking number digit length**. This number can be a maximum of 9 digits long. Be sure to use longer tracking numbers that change often for consistent variety.

Consider this example:



In this case a random 9 digit number is being generated. That number will be placed where the hash symbols (#) appear in the mask.

We've added "TN" and some dashes (-) to the tracking number to help break it up and make it more readable. If the random 9 digit number generated is 123456789. The final tracking number will look like:

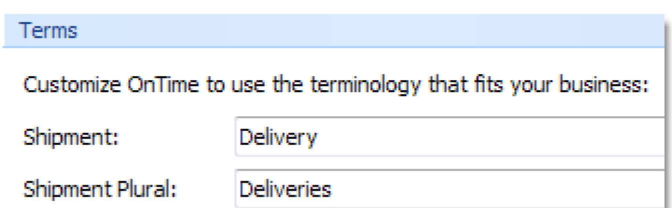
TN-123-456-789

When orders are placed on hold in *OnTime Dispatch*, a unique reference number (called an on hold number) is generated for the dispatcher to give the customer. This number is always randomly generated and follows the same rules as a randomly generated tracking number.

Terminology

The terminology used within OnTime may be changed to further custom tailor the system. Entries are case sensitive; capitalize where necessary.

For example, to change the term shipment to delivery, enter:



Save and sync with the OnTime server to propagate the changes to the organization. Some programs may need to be restarted to see the changes.

Connections

This section allows for modification of settings relating to how OnTime connects to other applications and services.

Customer portal URL should be specified as the web site address to the associated *OnTime Customer Web Portal*. This option will allow quick access to the portal from within *OnTime Management Suite* via the **Web Portal** link.

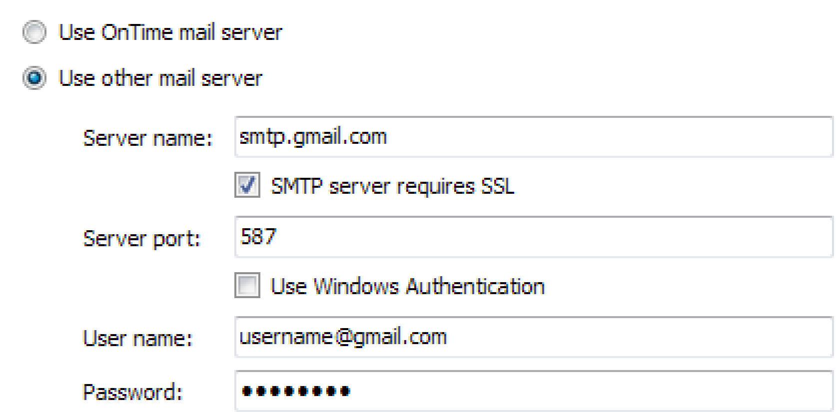
OnTime gives the option to choose different mail servers to send out notifications and email messages: either OnTime's mail server or another accessible mail server.

The OnTime mail server will automatically ensure that messages are sent out; however, the sender's address may appear as notify@ontimesystem.net. To have greater control over messages and to customize the sender's address, use settings for a different mail server.

The appropriate Internet Service Provider, webmaster, or server administrator should be able to provide the information requested in this section. The email server and account fields will need to be filled out accurately before messages can be sent.

- **Server name** is the SMTP server that is used to send email.
- **User name** and **password** are needed if the SMTP server requires authentication. If authentication is not required, then **user name** and **password** should be left blank.
- If OnTime is located on the same domain as the SMTP server, and the currently logged in windows user has permission, then the **use Windows authentication** can be checked to provide the credentials automatically.

Here's an example of how this might look when configuring OnTime to relay through a Gmail account:



OnTime can communicate with QuickBooks desktop versions, 2002 Professional and higher. QuickBooks must be installed on the same machine as the *OnTime Management Suite* for communication to occur.

Open the appropriate file in QuickBooks and click the **test connection to QuickBooks** button in OnTime. The two programs will attempt to establish a direct link to exchange data.

To specify the exact location of the QuickBooks Company file from within OnTime, click the Browse button and select the appropriate file.

Customer Web Portal

This section contains several options regarding the behavior and appearance of the *OnTime Customer Web Portal*. These settings are global, meaning that every customer will be affected by the adjustments.

Dispatch orders under the following user identity: Choose a user from the list with which all orders submitted through the *OnTime Customer Web Portal* will be associated.

Allow visitors to create an account based on the Template Customer: This option allows customers to create their own accounts for the OnTime Customer Web Portal. Ensure that this option is checked if customers should be able to create accounts.

Set template customer: If the above option is enabled, setup and specify a template customer. If a Template Customer is not specified, this feature will not work properly.

> What is a Template Customer?
>
> When a customer account is setup in OnTime, pricing, billing preferences, notifications, and other settings are required. When *you* setup a new customer, assigning these preferences is simple; however, if you want to allow a customer to create their own account, a Template Customer would be necessary.
>
> A Template Customer allows sensitive properties such as pricing and billing preferences to be pre-assigned, while the customer fills out the rest, such as contact information.

New account description: If the option for customers to create their own account is enabled, the text entered in this box will be displayed above the button used by customers to create accounts.

Show filter bar: This option controls whether or not the filter bar appears on the tracking page. The filter bar allows the customer to filter (or search) for specific text, dates, or numbers.

Display the following selected columns in the tracking grid: Check the columns that customers should be able to see. Checking too many columns may crowd the horizontal view of the tracking list.

Allow user to calculate pricing if available: If this option is selected, the *OnTime Customer Web Portal* will calculate prices in a similar way to *OnTime Dispatch*. We recommend leaving this option off until all pricing has been calibrated and tested. If the web portal has trouble arriving at a price for some reason, a message will appear that pricing is not available.

Display the following selected user defined fields in the dispatch form: OnTime allows up to 50 user defined fields. Already setup user defined fields will appear in this list. Check the any additional fields to be displayed to customers on the order entry page.

Allow user to edit linked locations: Check this option to allow customers to edit linked addresses. One address may be linked to multiple customers; ensure that this option is only selected if free editing of linked addresses by customers will not cause conflict.

Allow users to import bulk addresses: This option allows customers to add new locations into their address books via bulk import from CSV (comma separated value) files.

Allow users to add new locations: This option allows customers to add new locations into their address books manually.

Report templates include the shipping label, waybill, and bill of lading reports. These same reports are available in *OnTime Management Suite* under the Tracking view. Customizations made to reports from within the Tracking view may be displayed in the *OnTime Customer Web Portal* by clicking the corresponding blue link labeled **upload current**. To set the report on the web portal back to its default state, click the link labeled **reset**.

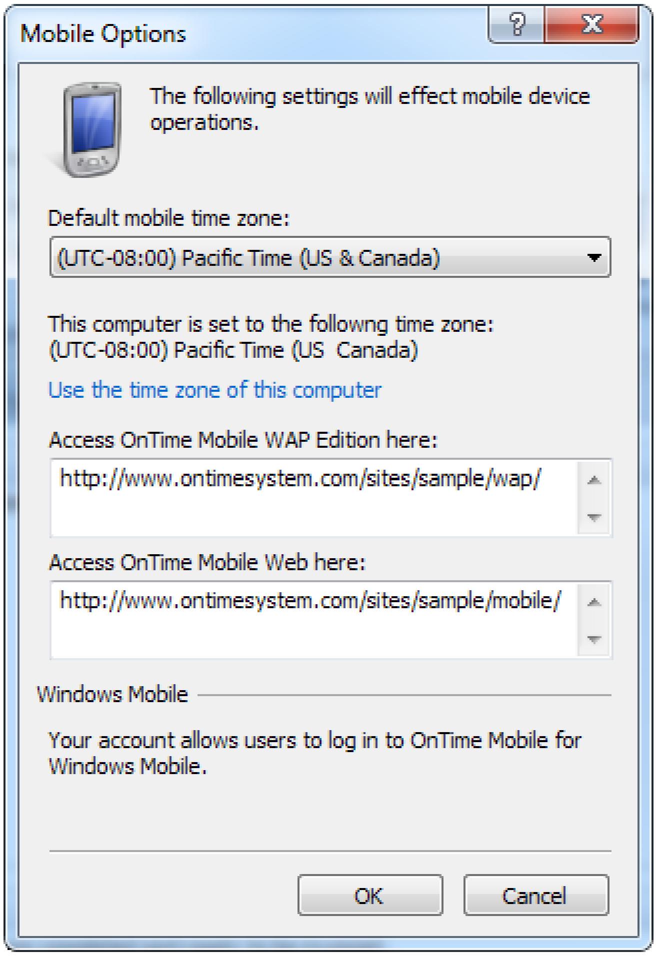
Synchronization

To allow OnTime the unique ability to work in both an online and offline state, data added and changed on one computer is synchronized with all computers running OnTime within the organization. This section provides options regarding how synchronization works on a particular computer.

- How do you want to keep this computer in sync with OnTime
  - **Automatically**: Any changes made will be automatically sent to everyone.
  - **Let me manually control when synchronization occurs**: This option causes a synchronization button to appear in the ribbon, allowing manual control over when synchronization with the OnTime service occurs.
- Optimize synchronization with the server for
  - **Slow Internet connections**: Select this option for slower or unstable internet connections. Information is transmitted is smaller chucks to improve reliability, but can slow down synchronization.
  - **Fast Internet connections**: Select this option for faster and stable internet connections, such as DSL or cable. Information is moved in larger chucks, which improves the speed of synchronization.
- If you and another user change the same record at the same time and there is a conflict
  - In a system such as OnTime, two or more people could edit the same record of data at the same time. While OnTime usually automatically resolves this conflict, sometimes a decision needs to be made regarding whose version of the data should be used. Users may use three options to determine when OnTime automatically assesses conflict and when the program prompts the user to decide a course of action:
    - **Ask me in each case**: A dialog box showing the two versions of data will appear every time that a conflict occurs. Select this option to stop OnTime from automatically resolving these conflicts.
    - **Always use the changes on the server**: If a conflict occurs, the changes made by others will always take precedence. Your changes will be overwritten.

Mobile Options

Mobile options affects how mobile device users view data in OnTime.



The **default mobile time zone** should be set to the time zone that the mobile workforce generally operates within. Individual users may be assigned to a time zone, but OnTime will refer to this default time zone for users without a designated time zone.

Note: Select the proper time zone based on the name, not just the time offset. Choosing the right name will ensure that local rules, such as daylight savings time, are applied.

Click the link labeled **use the time zone of this computer** to automatically set the default time zone to match the time zone setting on the local computer.

Access OnTime Mobile WAP Edition here: This section lists the URL, or web site address, of the WAP Edition to be used by mobile devices that are WAP enabled.

Access OnTime Mobile Web here: This section lists the URL, or web site address, of OnTime Mobile Web to be used by mobile devices that have a full web browser.

Windows Mobile: This section indicates whether or not Windows Mobile devices may access the OnTime company account. If this access is denied, directions will be given regarding an upgrade of the company account.

Price Sets

In OnTime, price sets are the foundation for calculating prices and defining service levels. Price sets take on different names depending upon context. To shippers and dispatchers, the term "Level of Service" is used to describe price sets.

To calculate pricing, OnTime generally performs two steps:

1. Calculate a base price
2. Modify that base price using price modifiers

A base price can be calculated based on zone-to-zone rates, distance rates, or a flat rate.

Price sets are defined at a global level, meaning that a price set may be created once and then associated with one or many customers. If that price set is altered from one location in the future, all changes made will be immediately applied to all associated customers.

Price sets will also allow for accessorial charges to be included. These accessorial charges may include any item that goes beyond the standard or basic services that every shipment receives. Examples include signature capture, COD, and wait time.

General

Enter a **Name** to identify the price set internally. This name will only be seen by the OnTime team, not customers.

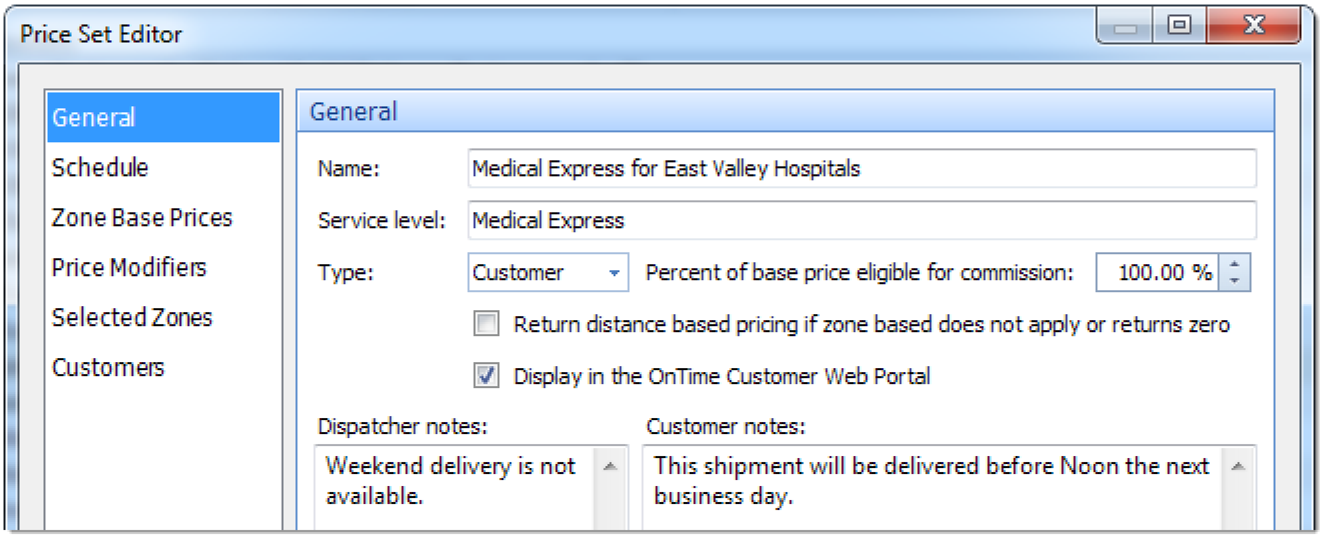
Enter a **Service level** name to identify to dispatchers and customers

Set the **Type** to indicate where in OnTime the price set will be available in OnTime. The **Type** offers the choice between charging customers or paying employees.

Leave the **Percent of base price eligible for commission** (the amount of the service level used to calculate workers' commission) at 100% for now

Enter any **Dispatcher notes**, which will appear to dispatchers who select this service level in the *OnTime Dispatch* application

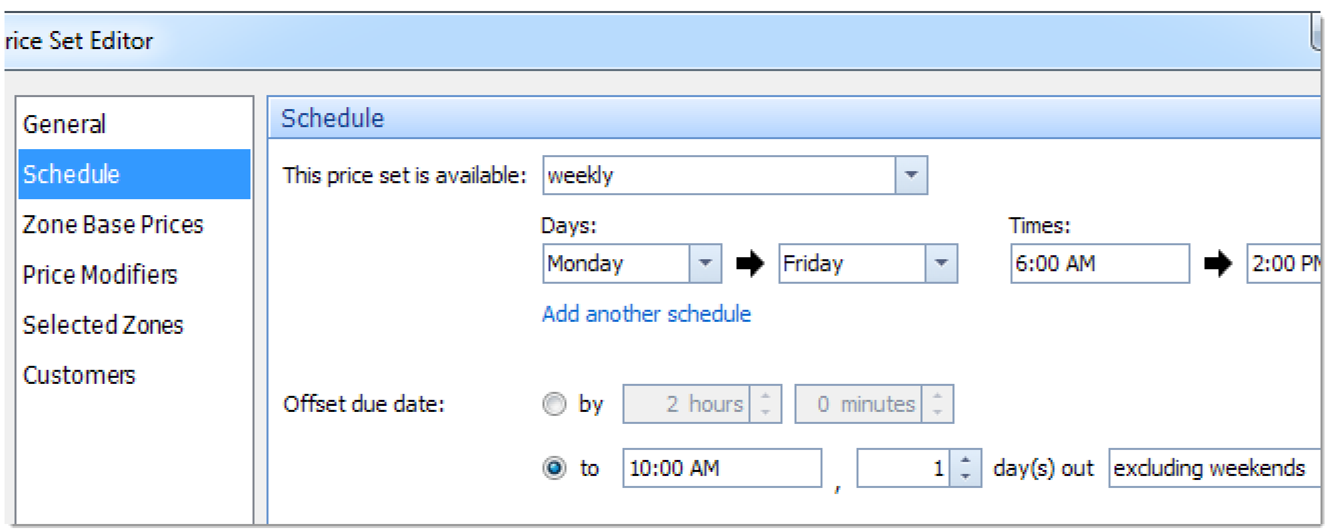
Enter any **Customer Notes**, which will appear to customers who select this service level in the *OnTime Customer Web Portal*.



Sample price set

Schedule

OnTime allows flexible schedules to be attached to price sets. These schedules may include when a service level can be used and when a shipment's due date should be set.



Sample price set schedule (Next day service, excluding weekends, delivered by 10 AM)

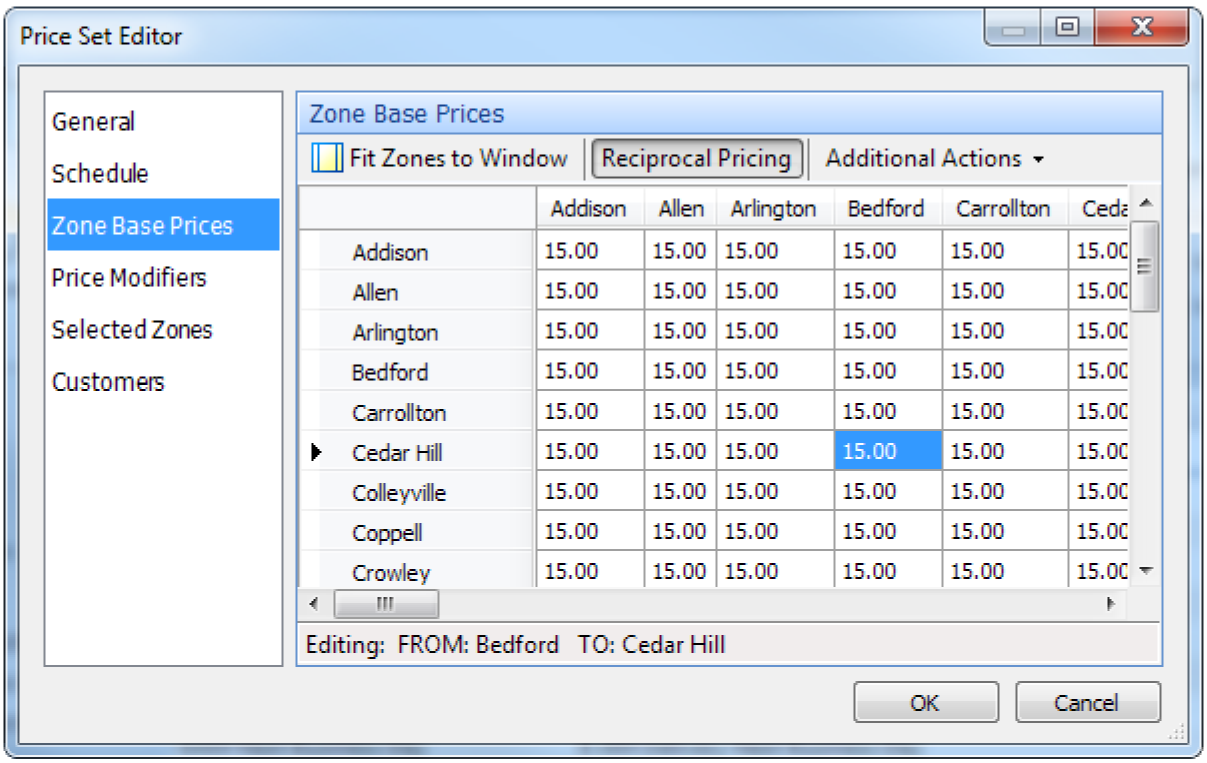
The upper portion of the schedule specifies the dates and times that the price set will be made available. Choices include:

- **Never**: The price set will never be made available
- **Anytime**: The price set will always be made available
- **Weekly**: The price set has a starting and ending day of the week, along with times for each day. For example: Monday thru Friday, 9:00 AM to 5:00 PM
- **On specific dates**: The price set has a starting and ending date and time

> **Note:** The schedule affects customers and dispatchers. Normally, the current time is used to determine if the schedule attached to a price set allows the customer to select that price set. If the current date and time is outside of the schedule, the price set will not appear in the list of service levels in the order entry screen. Dispatchers using *OnTime Dispatch* will see available price sets based on the date into the **date submitted** field.
>
> **Note:** For examples, refer to Chapter Two > How to Setup an OnTime Account > Step 4: Configure Pricing > Set the Schedule.

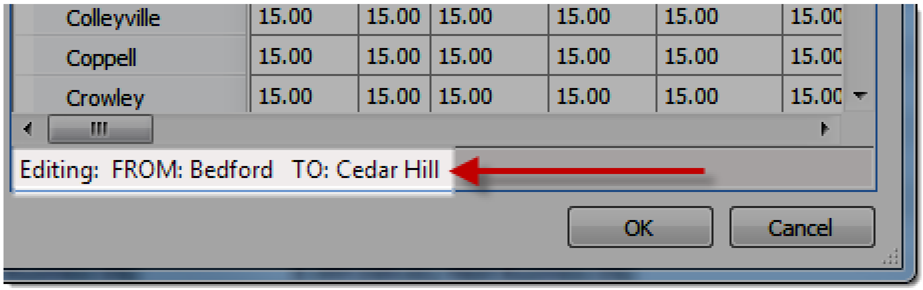
Zone Base Prices

OnTime offers a way to input zone-to-zone base prices, allowing for simplified price generation based on a fixed amount between two points. Zone base prices are displayed as a grid, with origin zones across the top and destination zones down the left-hand side. To specify a price between two zones, locate the point on the grid where the two zones intersect and enter the desired price into that cell.



Sample zone-to-zone price grid

For help specifying different amounts between zones based on direction, look at the bottom of the grid for a hint regarding the direction of the currently selected cell:



Pricing Input Tools

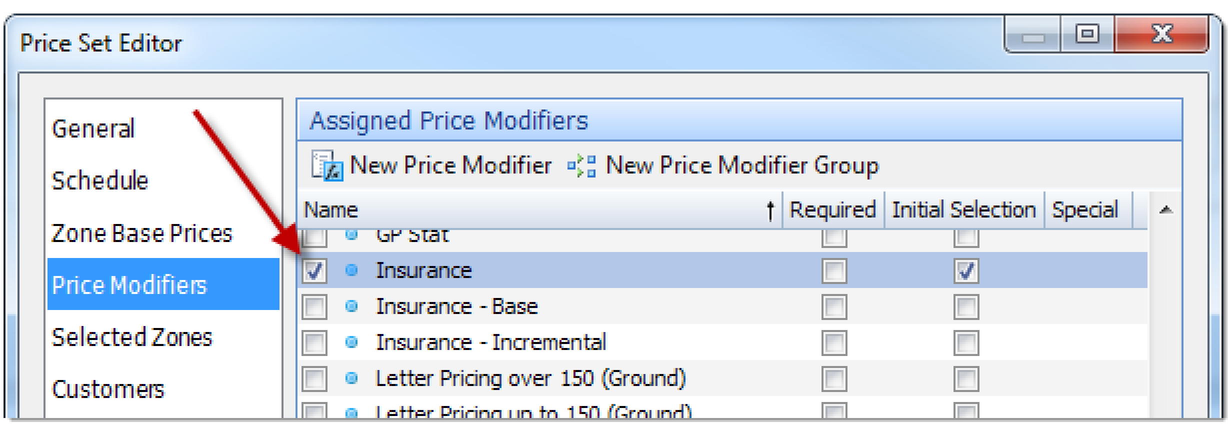
OnTime can help to significantly speed up the input of these prices using a few tools:

- **Reciprocal Pricing:** If an amount is entered into a cell connecting location (A) to location (B), OnTime will automatically input the same amount into the corresponding cell that connects location (B) to location (A). This feature is on by default.
- **Additional Actions > Fill Empty Cells With:** Automatically inputs a chosen amount into all empty cells. To use this feature, enter the desired amount (without the currency symbol) and then click **OK**.
- **Additional Actions > Adjust All Values:** If a grid is populated with prices and the values need to be increased or decreased enter the desired adjustment amount (without the currency or percentage symbol), choose how to apply the value (as a fixed number or a percentage), and click **OK**. The cells will automatically adjust accordingly. To decrease the prices, preface the amount with a negative symbol (for example: -1.50). Note: Only cells that have a value will be adjusted.

Price Modifiers

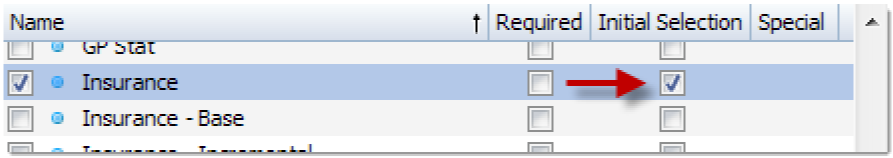
Price sets may contain as many modifiers as needed. All available modifiers will be listed. Simply check the ones that should be linked to the price set:

1. Locate a price modifier in the list and link it to the price set by checking the box on the left:

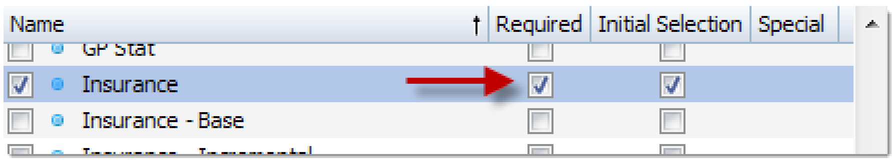


Note: For *price modifier groups*, individual price modifiers do not need to be linked. Link the group itself and OnTime will automatically ensure that the necessary calculations take place.

2. To have an option selected by default (may be unselected later), ensure that the **Initial Selection** box for that price modifier is checked:

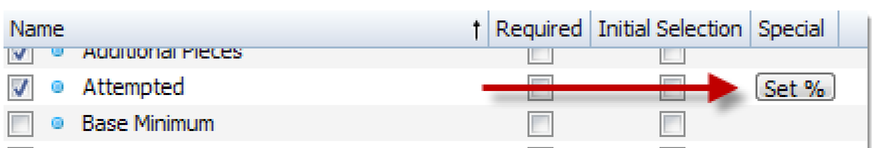


3. To make an option be mandatory (always selected), ensure that the **Required** box for that price modifier is checked as shown here:

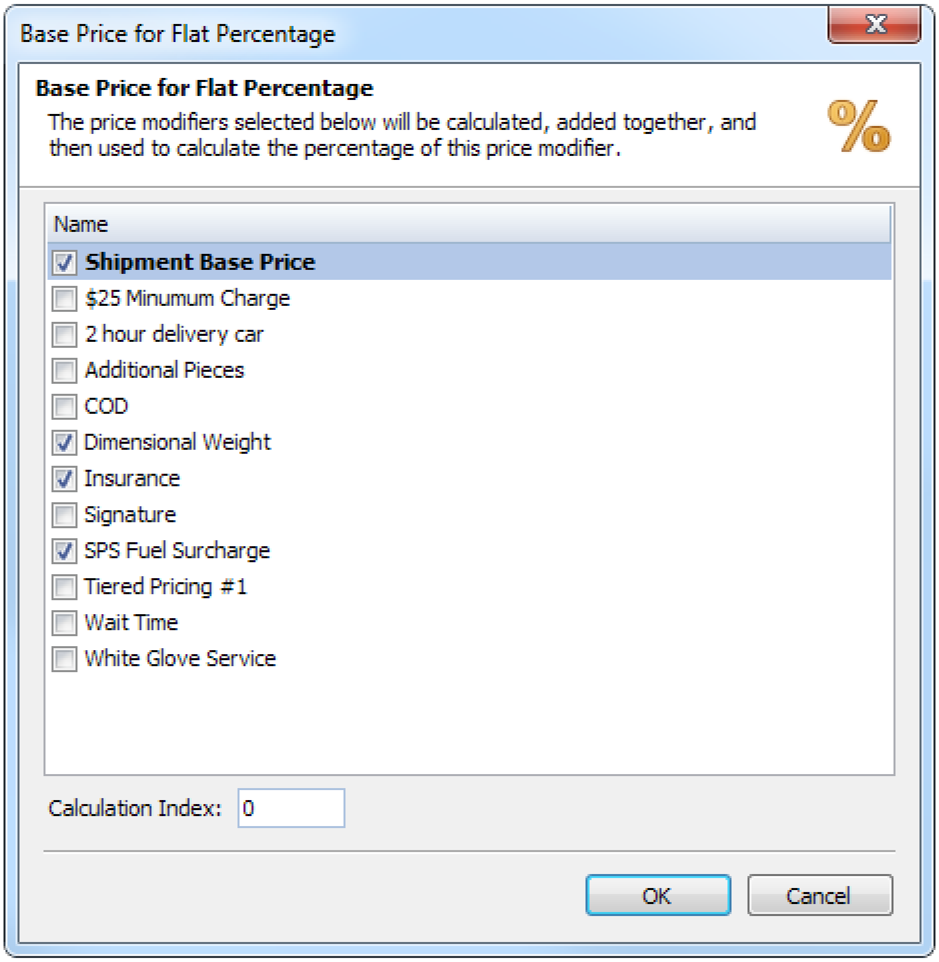


4. Click **OK** to save and close the price set
5. Repeat this process to have these modifiers appear in any other price sets
6. If the price modifier being linked has an action of *flat percentage*, the price for percentage calculation may be set. If your price modifier is set to access a 15% fuel surcharge, OnTime needs to know which prices in the order should be added up *before* calculating the 15%. This functionality allows distance and vehicle type charges to be included, but excludes non fuel related activities, such as wait time.

   When a price modifier that has an action of flat percentage is selected, a button will appear in the special column, as shown here:



7. Click the **Set %** button to tell OnTime which items should be included in the percentage calculation by checking the appropriate boxes:



8. Click **OK** to save your preferences.
9. Click **OK** to save and close the price set.
10. Repeat this process for any other price sets that you would like these modifiers to appear in.

When a modifier is added to a price set, it will appear to the dispatcher as part of a list of available modifiers. The dispatcher will be able to select which modifiers need to be applied to a particular order.

Price sets can only contain one of certain types of modifiers. The restricted modifiers are **signature capture**, **collect on delivery (COD)**, and **distance base price**. More than one of these types of modifiers can be created and used in the system; however, only one of each can be added to any price set.

Selected Zones

Some price sets do not need pricing information to be defined for each and every possible zone combination. The selected zones area allows limitation of the number of zones associated with a price set.

Ensure that the price set references **select zones**. Associate zones with the price set by selecting the desired zone(s) in the list. If a price is requested for zones that are not part of a price set, a zero (0) value will be returned. The grid in the **Zone Base Prices** area only displays zones that have been associated.

Customers

This section displays a list of all customers. Check marks will appear next to the names of customers that are currently linked to the opened price set. Check and uncheck names accordingly to manage pricing for customers.

Price Modifiers

A price modifier (or accessorial charges) adjusts a given base price, making modifiers an excellent choice for any extras, such as a fuel surcharge or an additional weight charge.

Modifiers are created at a global level, meaning that once one is created, it can be used anywhere in OnTime and can be applied to any customer. This functionality saves the time of re-creating the same modifier for each customer, also allowing a modifier to change across multiple price sets, which is especially helpful in the case of frequently changing global accessorial charges such as fuel surcharges.

Classification of Modifiers

Modifiers can be classified into two categories: *customer* and *driver*.

Both categories are used in a similar manner to change pricing, but the *driver* category is designed to work with employee/sub-contractor pay and the *customer* category for customer billing.

Types of Modifiers

Different types of modifiers accomplish different tasks. The different types include:

- **General Option**: The modifier will appear to the dispatcher in the check box list of available options for the service level/price set selected.
- **Signature Capture**: This type is tied directly to the check box on the order form labeled **digital signature capture**. Modifiers of this type will not appear to dispatchers in the check box list of **standard options**.
- **Collect on Delivery (C.O.D.)**: This type is tied directly to the check box on the order form labeled **collect on delivery**. Modifiers of this type will not appear to dispatchers in the check box list of **standard options**.
- **Distance base price**: This type is tied directly to the distance base price on the order form. Modifiers of this type will not appear to dispatchers in the check box list of **standard options**.

A distance modifier type is useful in cases where the base price needs to be accessed based on distance instead of or in addition to zone-to-zone pricing. Because OnTime calculates the total cost of an order as a base price, plus adjustments from any selected modifiers, the special distance modifier type acts as a base price on top of which all other modifiers are applied. The distance base price is defined as a price modifier, allowing for the creation of several pricing scenarios for distance based orders.

Adjusting Prices with Actions

The **action** property of a price modifier indicates the type of math that will be applied when calculating the cost of that modifier. The cost of the modifier is always based on the base price of the order, which can be defined on a zone-to-zone, distance, or flat rate basis. The price of a modifier is not compounded against other modifiers.

- **Flat Amount**: A specific amount to apply to the base price if the modifier is selected at time of order and can be a positive or negative number and may contain decimal places. Examples: 10, -10, 9.95
- **Flat Percentage**: A percentage to apply to the base price if the modifier is selected at time of order and can be a positive or negative number and may contain decimal places. Examples: 10, -10, 9.95
- **Flat Overage Amount**: A specific amount to apply to the base price if the modifier is selected at time of order and the **watch value** field exceeds the value specified by the **threshold** field. This value can be a positive or negative number and may contain decimal places. The charge calculated by this modifier action is only applied once upon exceeding the threshold.
- **Flat Overage Percentage**: A percentage to apply to the base price if the modifier is selected at time of order and the **watch value** field exceeds the value specified by the **threshold** field. This value can be a positive or negative number and may contain decimal places. The charge calculated by this modifier action is only applied once upon exceeding the threshold.
- **Incremental Overage Amount**: A specific amount to apply to the base price if the modifier is selected at time of order and the **watch value** field exceeds the value specified by the **threshold** field. This value can be a positive or negative number and may contain decimal places. The charge calculated by this modifier action is applied every time the threshold is exceeded by one (1).
- **Incremental Overage Percentage**: A percentage to apply to the base price if the modifier is selected at time of order and the **watch value** field exceeds the value specified by the **threshold** field. This value can be a positive or negative number and may contain decimal places. The charge calculated by this modifier action is applied every time the threshold is exceeded by one (1).

Defining an Increment

The **increment** field is available for use of an *incremental overage* action. The **increment** defines the amount by which to count the **watch value**. An **increment** is usually one (1), but can be changed to whatever amount is needed. Up to three decimal places are supported, making an increment value such as 12.345 possible.

EXAMPLE

If you had a charge for additional weight and assessed the charge in 5 pound increments, you would set the **increment** to 5. When examining the total input, only the whole number of increments will be returned.

In the example above, if the weight were 10 pounds then the result would be 2, because only 2 increments of 5 are possible within 10.

What would happen if the weight were not evenly divisible by the **increment**, let's say 18? In that case, only the whole number of increments is returned. A value of 3 would be returned because that is the maximum number of times that the **increment** of 5 can be divided into 18.

Watch Values

A **watch value** is the field on the order form that a modifier will look to when performing its calculations. These fields may be the weight, quantity, distance, or volume of a shipment and are compared with the **range** to

determine if the price modifier should be assessed. This ensures that a modifier only generates a price if specific criteria are met.

- **Weight**: The weight field on the order form.
- **Quantity**: The calculated total quantity of the shipment. This value may include additional quantity if the dispatcher adds items to a shipment.
- **Distance**: The distance field on the order form.
- **Height**: The height field on the order form.
- **Width**: The width field on the order form.
- **Depth**: The depth field on the order form.
- **Cubic Dimensions**: The calculated volume of the shipment. This value may include additional volume if the dispatcher adds items to a shipment. To generate a volume, the height, width, and depth need to all be set to a value greater than zero.
- **Declared Value**: The declared value field on the order form.
- **Base Price**: The base price that was selected and calculated for the order.
- **Custom Amount**: In this case a special field will appear allowing the dispatcher to enter a numeric value that can be arbitrarily entered. This type of **watch value** should be specified when none of the standard inputs apply.

The Value

The **value** field is the amount used to calculate a price. This field usually represents the amount to charge for the price modifier. The **value** can be a positive or negative numeric value and may contain decimal places. In most cases, the **value** will be an amount of money. Consider these examples:

- **Action** is set to *Flat Amount* and **value** is set to $5.00. The result will always be $5.00.
- **Action** is set to *Incremental Overage Amount* for weight, **increment** is set to 1, and **value** is set to $2.00. With a weight of 5 pounds, the result will be $10.00 (5 X $2).

If percentage **actions** are used, then **value** becomes the percentage to be used. The percentage should be expressed as the actual amount desired, not a fraction of one (1). In other words, to specify fifty percent (50%) we would enter "50" and not "0.50". Here is an example:

- **Action** is set to *Flat Percentage* and **value** is set to 7.5. If the base price of the order is $10.00, then the result would be $0.75.

Ranges

When using overage **actions**, a **range** can be specified to indicate when a price modifier should be used and when it should be ignored. The range works in conjunction with the field that is selected for the **watch value**.

For example, if we set the **watch value** to distance, the starting **range** to 10 and the ending of the **range** to none, then if the distance calculated were 8 miles, the price modifier would be ignored because the distance is not

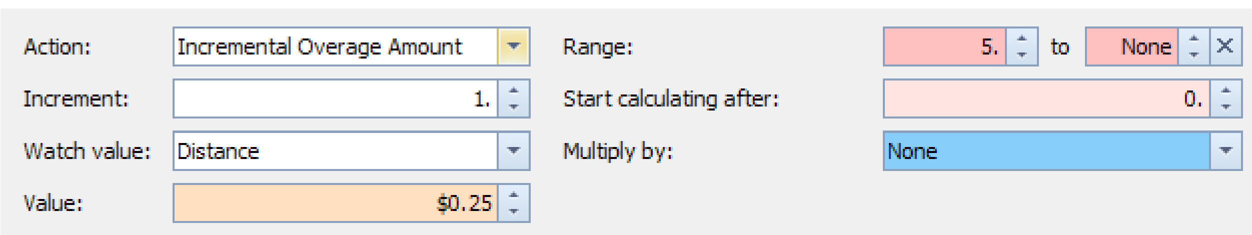
within the **range** (not at least 10 miles).The **range** can be positive or negative numeric values and may contain decimal places.

- **Range (start applying after)**: This option (first text box) specifies the starting point for the range. The input will need to be greater than this starting point. Anything equal to or lesser than will be ignored.
- **Range (stop applying before)**: This option (second text box) specifies the ending point for the range. The input will need to be lesser than this ending point. Anything equal to or greater than will be ignored. You can also specify "**None**" as a value. This value indicates that there is no upper limit on the range. If a number is entered into the box, you can change it to **None** by selecting the contents of the box and pressing the backspace key until the box is completely empty. When you move to another box, the ending point will then show **None**.

Where to Start Calculating

Start calculating after: This field specifies the starting point for pricing calculations. Whereas the range discussed in the last section determines when a price modifier should be *used*, this field determines at which point or level a price modifier should *begin its calculations*.

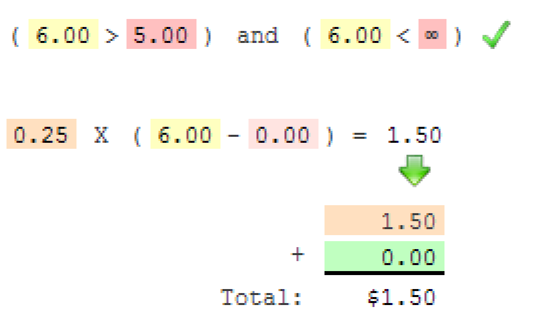
Consider the following fuel surcharge example:



Include up to 5 miles in the base price of an order. If the distance is over 5 miles, start charging $0.25 per mile from the very start (or zero miles)

Notice that the **start calculating after** box is set to zero (0). This value instructs OnTime to start calculating the fuel surcharge from the very first mile, instead of waiting until after the 5th mile.

Let's run a test on this, using 6 miles:



The charge of $0.25 is for all 6 miles, not just 1. As a result, the fuel surcharge is accessed at $1.50 (6 X $0.25).

Remember: If the starting calculation point needs to match the range starting point, be sure to set both of them the same.

Additional Multiplication

At times, adding another layer of multiplication to a price modifier may be necessary. For instance, if the customer should be charged $1/km *and* the shipment should be multiplied by weight.

In such cases, use the **multiply by** list to specify a field from which to gather the amount for additional multiplication. This feature can be very helpful in zone-to-zone based pricing, in which a price modifier must be calculated based on a zone figure.

Warning: Be careful when setting this option to something other than "None". Unless used properly, an additional layer of multiplication can cause prices to be wildly inaccurate. This inaccuracy is usually caused when using an incremental **action** type because these already perform multiplication against the **watch value**. Always test price modifiers before making them available to customers.

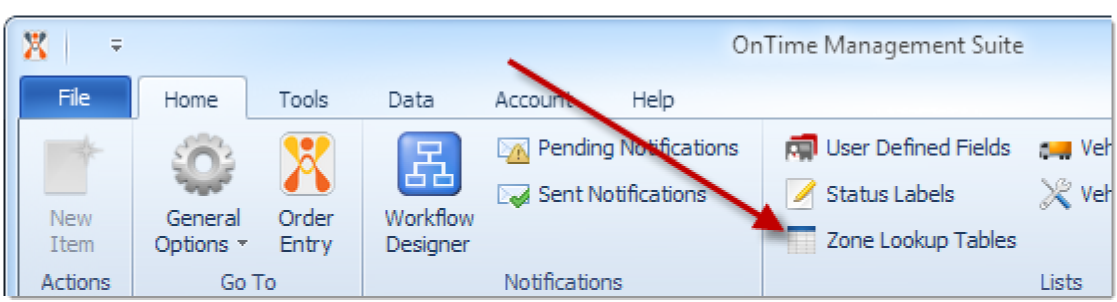
Zone Based Lookup Tables

The **Zone Based Lookup Tables** are very useful for companies who calculate pricing using zones. Normally, a price modifier has a single, fixed value against which calculation take place. When a varying amount against which to calculate – an amount that changes based on the zones involved – is required, use a **Zone Based Lookup Table** with the price modifier to achieve the desired results.

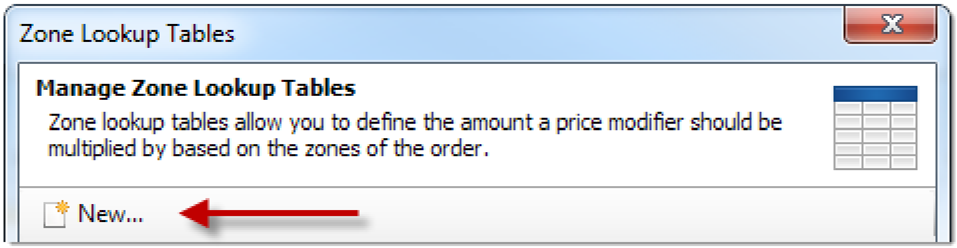
For example, a weight charge may sometimes be a flat amount per pound no matter where the shipment is going. In other cases, the per-pound rate should change based on the zones involved. OnTime's **Zone Based Lookup Table** makes this scenario easy to implement.

To Create and Use a Zone Based Lookup Table

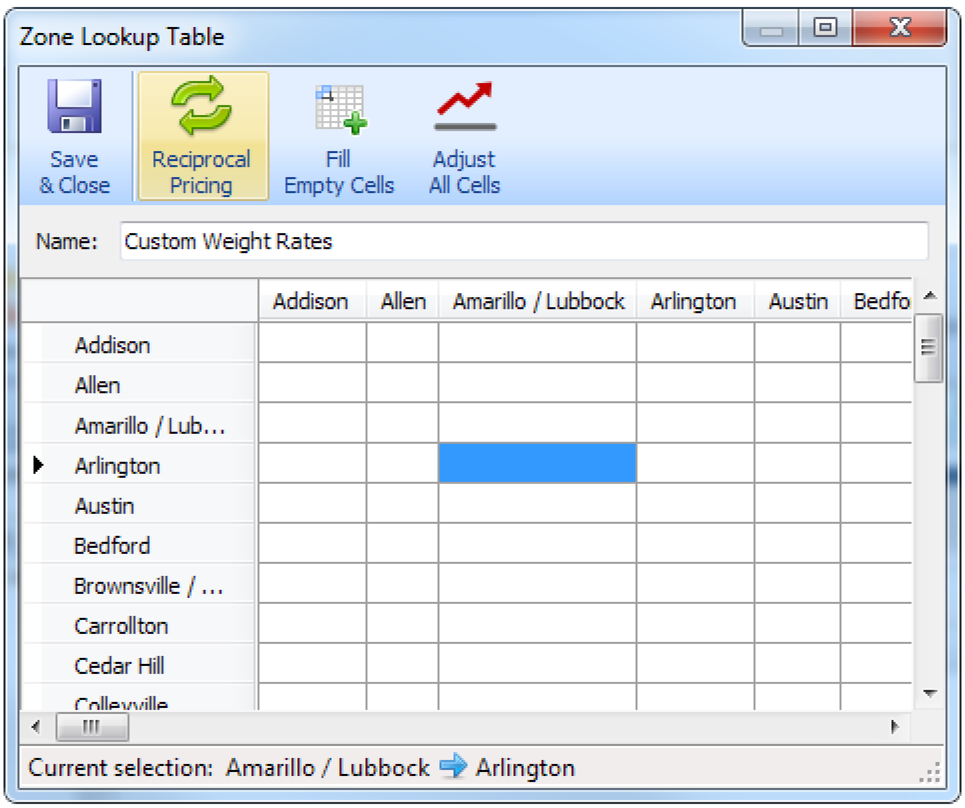
1. Click on the **Zone Lookup Tables** button in the ribbon under the **Home** tab:



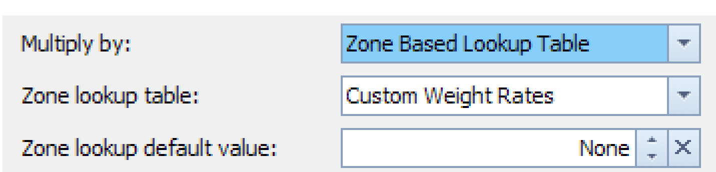
2. From the zone lookup table management window, click the **New** button:



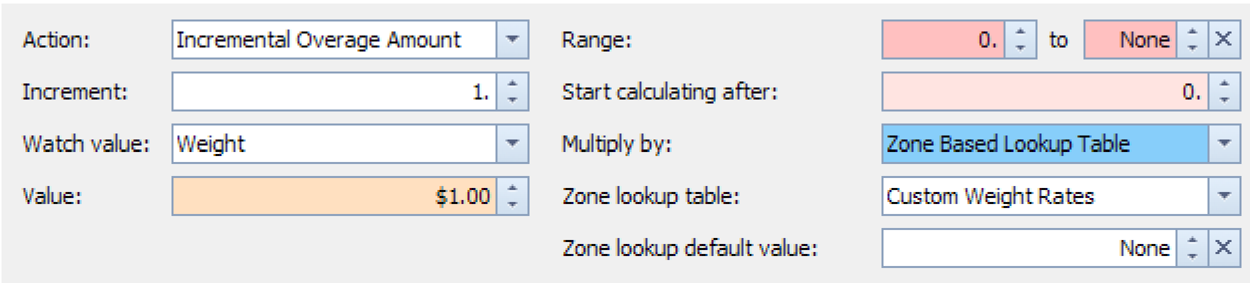
3. The resulting window will allow a **name** to be assigned to the table and rates may be filled out. Select the cell in the grid where two desired zones intersect and place your rate. When an order is entered with those two zones, the intersecting rate will be returned from the lookup table:



4. Go back to the price modifiers; when you change the **multiply by** field to **Zone Based Lookup Table**, another list will appear allowing you to choose from your list of lookup tables:



The example we considered earlier (in Zone Based Lookup Tables) with a variable rate on weight charges would look like this:



In this example, the weight is counted up, starting from zero (0). It's then multiplied by $1.00 as specified in the value field. Because we're multiplying by 1, the amount will still be the same number as the weight. OnTime then pulls the appropriate rate from the **Zone Based Lookup Table** and multiplies that rate against the weight. Now it's easy to have different rates for every zone you service.

Zone Based Lookup Tables referenced in a price modifier may include a default value. If specified, the **Zone lookup default value** will be used when zone matches are not found in the lookup table or when a match is found, but the corresponding cell in the table is blank.

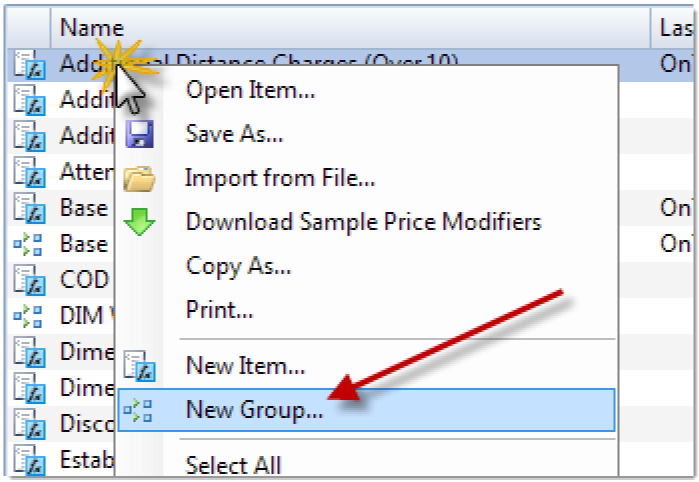
Note: The testing area does not test price modifiers that use **Zone Based Lookup Tables**.

Grouping Price Modifiers

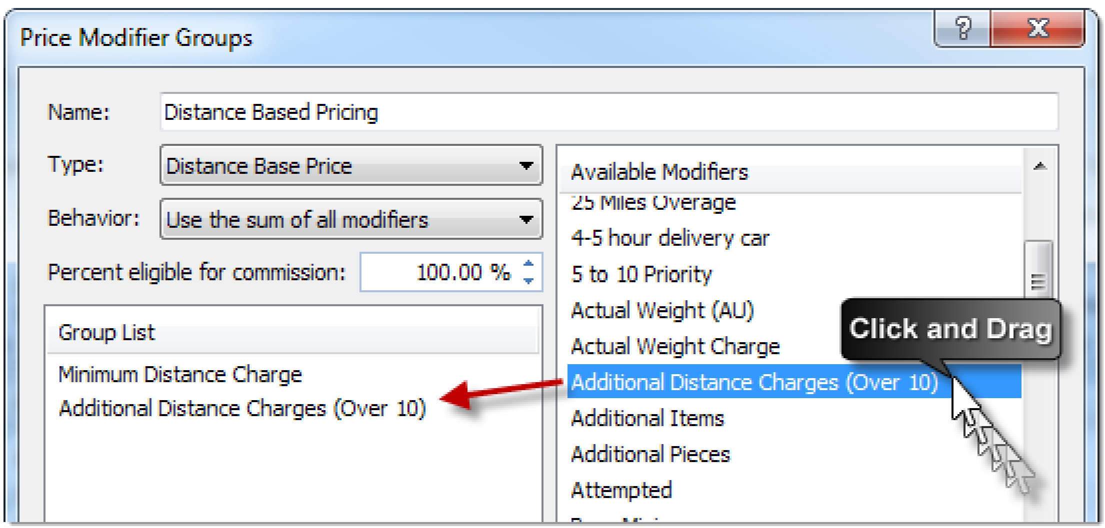
Sometimes, we must have the ability to evaluate two or more price modifiers and use the price of the highest or lowest. This ability is available via the creation of a **new group**. A price modifier group allows you to add as many modifiers as you want and then choose to use the highest, lowest, or summed price that is evaluated.

To Create a New Group

1. Right-click inside the price modifiers list and choose **New Group**.



2. Modifiers can be grouped in this window by dragging them from the list on the right to the list on the left. Create the modifier group as shown below and click **OK** to save it:



3. Address the following options, as appropriate:
   - **Name**: This is the name of the group. It will appear to everyone, including customers, as the price modifier name.
   - **Type**: As with normal price modifiers, this type instructs OnTime where the modifier should be used when creating orders.
   - **Behavior**: Since OnTime calculates each modifier in the group separately, the question is what to do with those calculations in the end. The behavior list allows you to select from three actions:
     - **Use the highest priced modifier**: After calculating all applicable modifiers in the group, the amount of the highest modifier will be returned.
     - **Use the lowest priced modifier**: After calculating all applicable modifiers in the group, the amount of the lowest modifier will be returned.

- **Use the sum of all modifiers**: After calculating all applicable modifiers in the group, the amounts of all modifiers are added up and returned.

> **Note**: Only applicable modifiers are calculated and considered in a group. The most common reason for a modifier in the group to not be applicable is because the values are outside of the range.

- **Percent eligible for commission**: OnTime allows a commission to be assigned to any user in the form of a percentage. If that user is involved in the delivery of a shipment, that percentage is calculated against the cost of that shipment.
    - Setting this value to less than 100% will mean that the user will get a lesser amount than normal from this price modifier.
    - For example, if the user is an employee and should not receive a part of the fuel surcharge, set that value to 0%. In that case the driver would get commission on everything in the order except the fuel surcharge, in which case he will get no commission at all.

Testing Modifiers

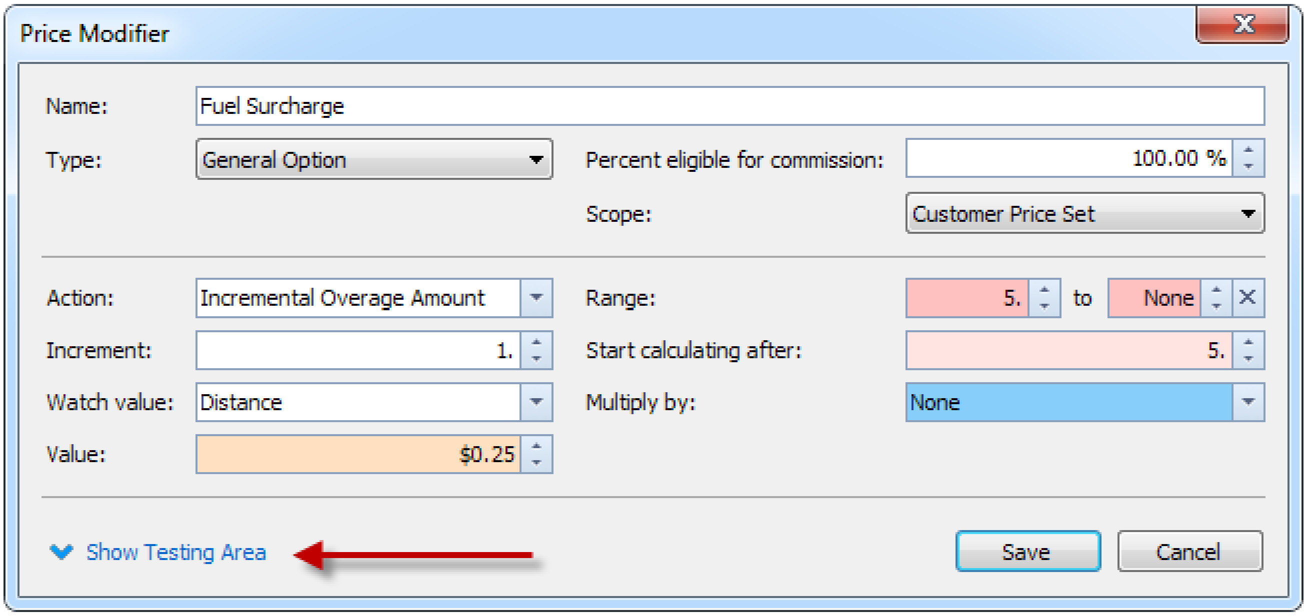
Do not leave the testing of pricing to customers. OnTime includes a testing area that helps to ensure modifiers are calculating as expected.

To test a price modifier, fill in the fields required for the test. For instance, testing a fuel surcharge requires that the base price and mileage fields are filled to properly test.

> **Note:** If you're not sure which fields need to be filled out, click the **Test Modifier** button and it will alert you if more fields need data.

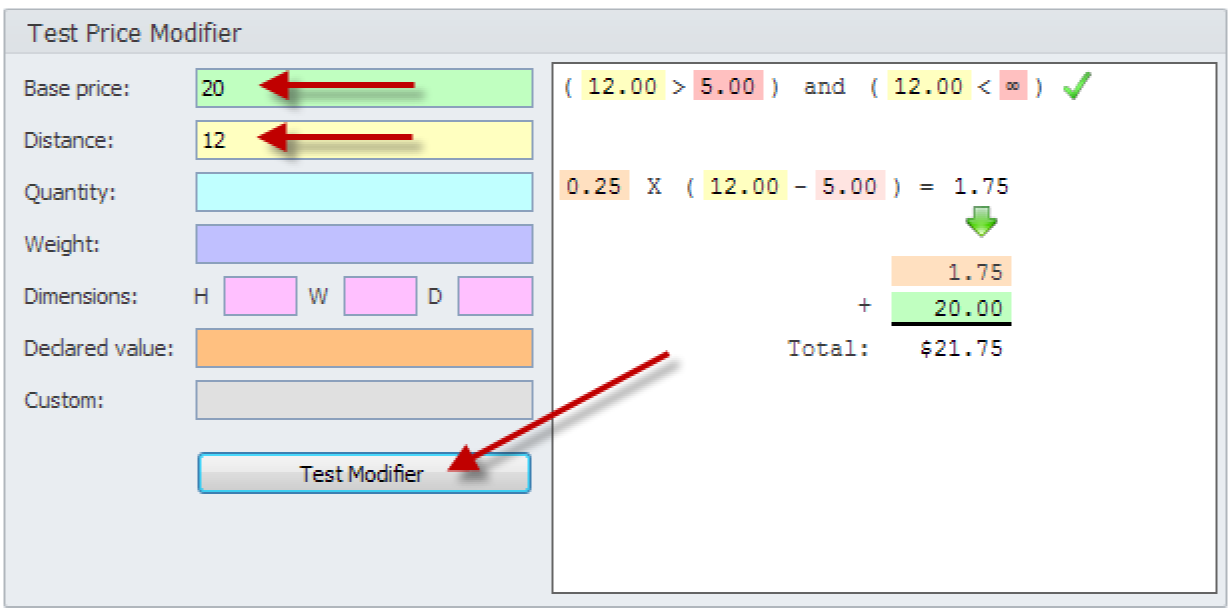
EXAMPLE:

This example represents a fuel surcharge that accesses $0.25 per mile for every mile driven over 5 miles. To test this, we'll click the button to show the testing area:



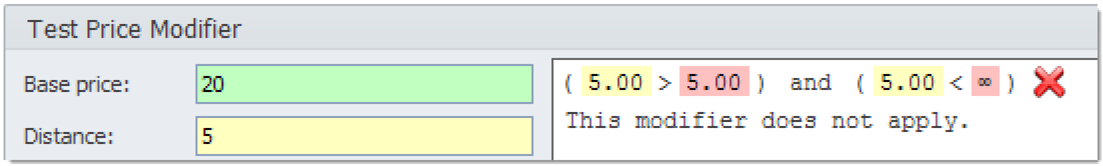
In the testing area, we indicate that the base price of the shipment is $20 and that the distance driven is 12.

After filling out those fields we click the **Test Modifier** button and notice the results:



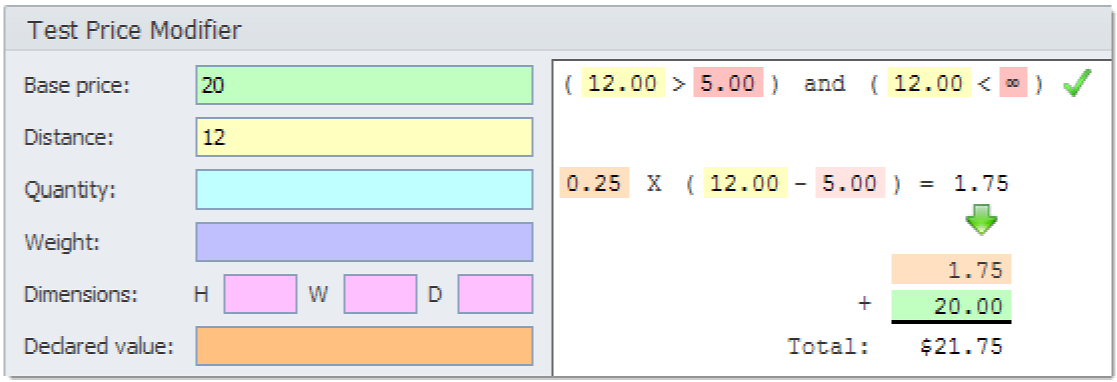
The results are visible on the right side. The first line indicates if the modifier applies. If so, a green checkmark appears indicating that the 12 miles is greater than the 5 mile threshold.

If we enter only 5 miles in the test, the results change:



Because 5 miles is outside of the range specified for this modifier, it will not apply and OnTime returns a price of $0.

Returning to the previous example of 12 miles:



The results detail how the price of the fuel surcharge is calculated. Different values are color coded to show how the numbers are used; offering insight into the way OnTime calculates price modifiers. As a result, the setup of price modifiers can be experimenting with and continually tested until the calculation is perfected, giving you confidence that your pricing will work as intended.

Dimensional Weight

Shipping costs are generally influenced by the weight of the cargo being transported; however, certain kinds of cargo make charging strictly by actual weight impractical and unprofitable. For instance, cargo that is large and bulky but has a relatively low actual weight, such as foam drinking cups.

Using dimensional weight (as opposed to actual weight) solves this problem by assuming a nominal density for cargo and increasing the billable weight to compensate for the extra volume.

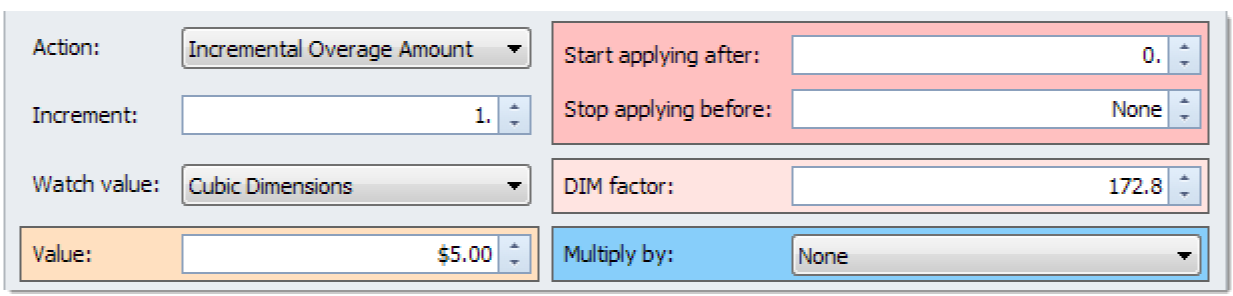
OnTime allows carriers to use dimensional weight as part of their billing calculations. Dimensional weight has been integrated into the standard modifier system to enable maximum flexibility when defining the dimensional weighing system to be used by a carrier. Defining dimensional weight as a modifier enables dispatchers to determine quickly if an order should apply actual or dimensional weight charges.

How to Enable Dimensional Weighing

Dimensional weighing is enabled from the price modifiers area of *OnTime Management Suite*.

Note: Dimensional weight calculations are supported in all modifier actions except for **flat amount** and **flat percentage**.

1. Select the desired action and a list of **Watch Values** will become available
2. Select **Cubic Dimensions** from that list to specify the current modifier as a dimensional weight modifier. Once **Cubic Dimensions** is selected, the **Start calculating after** field will be renamed **DIM factor**. This change means that the dimensional factor for this modifier can be entered.



Dimensional Factor

The Dimensional Factor (**DIM Factor**) is a mathematical factor that is used to calculate the dimensional weight of a package. The **DIM Factor** represents the allowed volume of a package per unit of weight.

OnTime compares the **DIM Factor** specified in a dimensional modifier with the **DIM Factor** of an order. The **DIM Factor** of an order is calculated by dividing one weight unit into one cubic volume unit.

Note: OnTime allows any measurement units to be entered into the dimensions field. The calculations do not change between metric to imperial units.

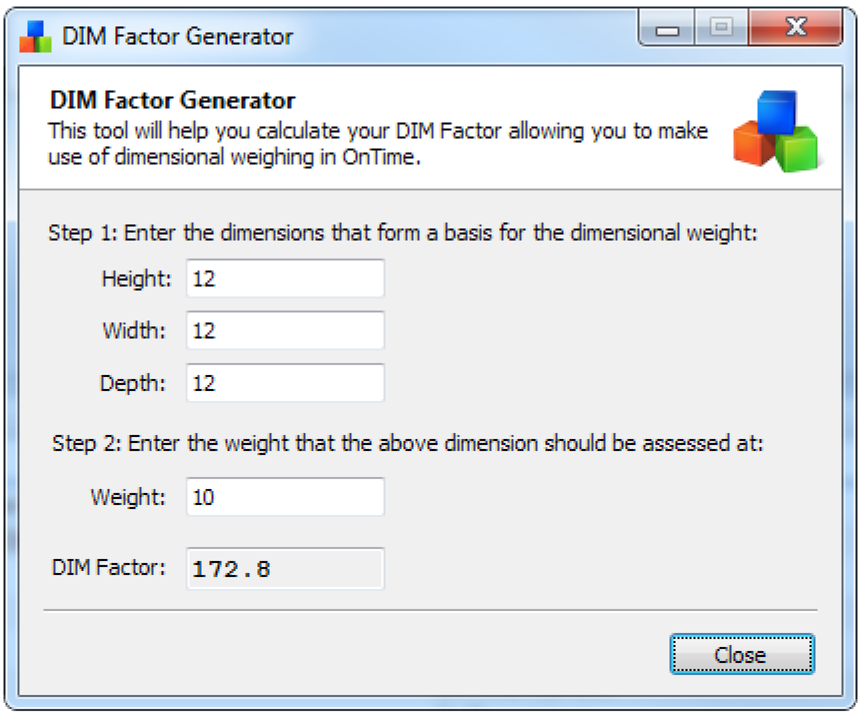
EXAMPLE:

If a dispatcher enters the measurements of a package as 12 x 20 x 8 (Inches) the **DIM Factor** is calculated as follows:

$$\frac{12'' \times 20'' \times 8''}{1\ lb} = \frac{1920\ in^3}{1\ lb} = 1920\ \ in^3/lb$$

This **DIM Factor** is then compared to the **DIM Factor** that was defined in the dimensional modifier using the modifier action specified. The **DIM Factor** in the modifier can be derived from any volume to weight ratio that is necessary.

In *OnTime Management Suite*, the **Tools** tab in the ribbon contains a tool labeled **Calculate DIM Factor**.



Resulting window

This tool can assist in determining a **DIM Factor** based on any desired system of measurements or volume to weight ratios.

Alternatively, a carrier may use a previously defined DIM Factor.

Using Dimensional Weight in a Price Modifier

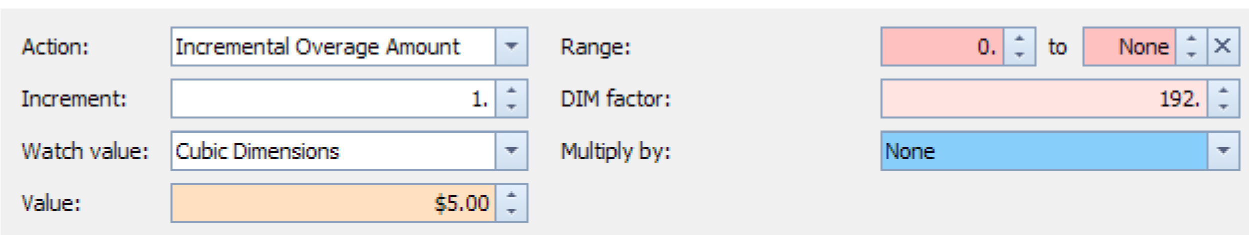
Note: Dimensional weight calculations are supported in all modifier actions except for **flat amount** and **flat percentage**.

1. Select the desired action and a list of **Watch Values** will become available
2. Select **Cubic Dimensions** from that list to specify the current modifier as a dimensional weight modifier. Once **Cubic Dimensions** is selected, the **Start calculating after** field will be renamed **DIM factor**. This change means that the dimensional factor for this modifier can be entered.

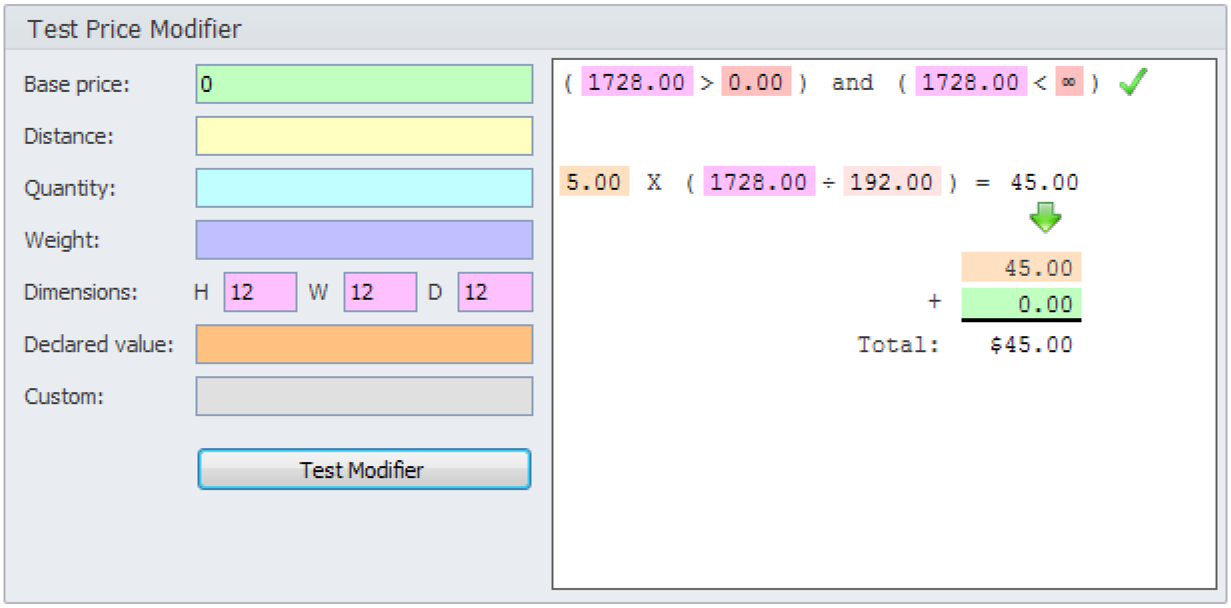
OnTime effectively converts the volume of a shipment into dimensional weight units, allowing the price to be assessed based on the number of virtual kilos or pounds. OnTime offers an easy way to work with dimensional weight, allowing the creation modifiers that work in the same way as actual weight.

EXAMPLE:

Below is a price modifier based on dimensional weight which will access $5.00 for each kilo or pound of dimensional weight (which we arrive at by using a **DIM Factor** of 192):



The modifier is tested by putting a volume of 12x12x12, which equals a cubic volume of 1,728, which, when divided by the **DIM factor**, turns into 9 dimensional kilos or pounds. Nine times $5.00 gives us a dimensional weight charge of $45.00:


Test Price Modifier
Base price: 0
Distance:
Quantity:
Weight:
Dimensions: H 12 W 12 D 12
Declared value:
Custom:
Test Modifier
(1728.00 > 0.00) and (1728.00 < ∞)
5.00 X (1728.00 ÷ 192.00) = 45.00
45.00
+ 0.00
Total: $45.00

Vehicles

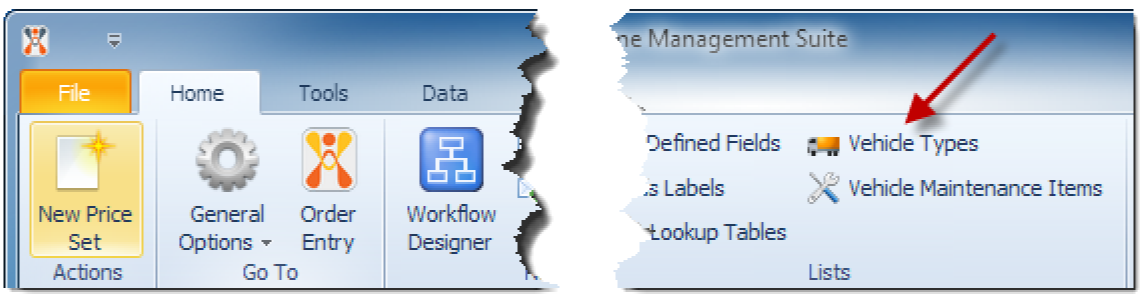
Organizing vehicles in OnTime allows for individual users' mileage to be tracked. Additionally, maintenance schedules can be determined and drivers' vehicles will be compared to shipment requirements before dispatching.

Managing Vehicles Types

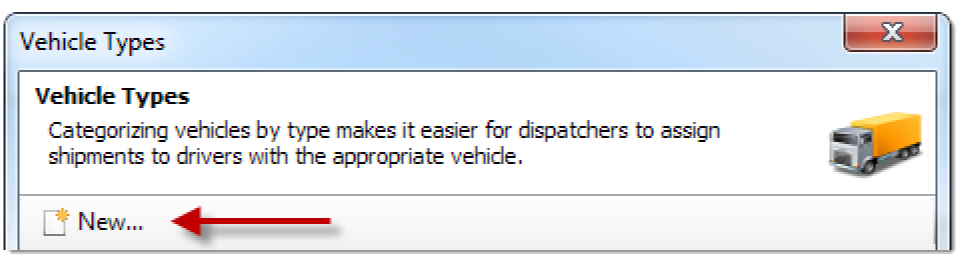
Vehicle types categorize vehicles in a fleet. Organizing by type can help to assign an order to the driver that has the appropriate vehicle type to accommodate the delivery.

To Add a Vehicle Type

1. Click on **Vehicle Types** from the **Home** tab on the ribbon:



2. From the **Vehicle Types** management window, click the **New** button:



3. Enter a type of vehicle in the **Name** text box. Repeat for additional vehicle types.

Overview of Vehicle Maintenance Items

OnTime can effectively manage maintenance schedules, ensuring that vehicles receive preventative care as required. To allow OnTime this ability, setup maintenance items at a global level and then associate those items with the appropriate vehicles.

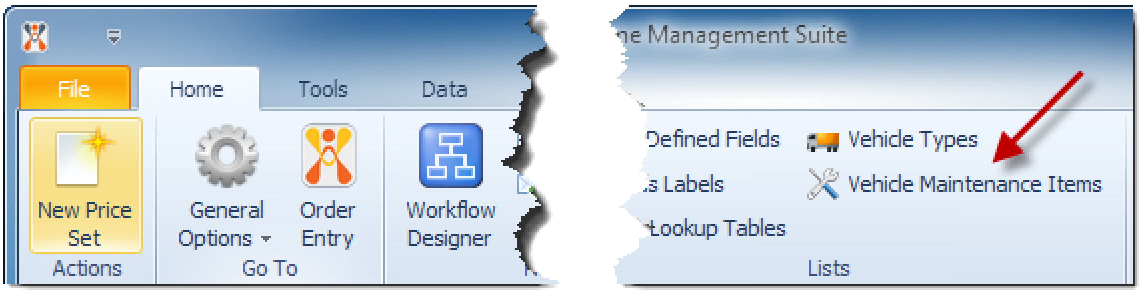
Maintenance items are tracked in relation to the associated vehicles' mileage since last maintenance or time passed since last maintenance. OnTime will issue an alert when maintenance is due for a particular vehicle.

Managing Vehicle Maintenance Items

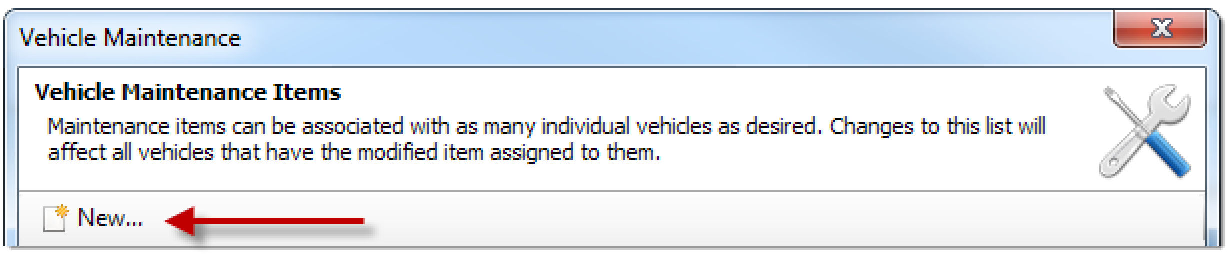
Maintenance items are scheduled activities, such as oil changes and tune ups.

To Add a Vehicle Maintenance Item

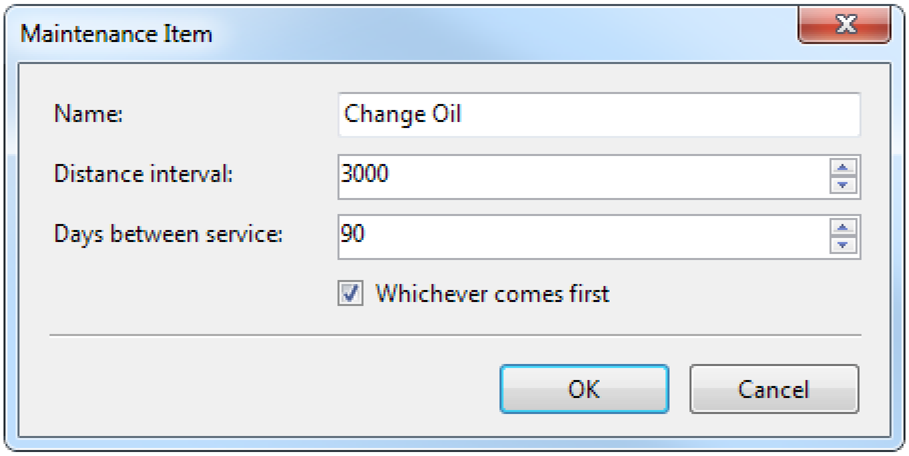
1. Click on **Vehicle Maintenance Items** from the **Home** tab on the ribbon:



2. From the resulting vehicle maintenance items management window, click the **New** button:



3. Enter a **Name** for the new item
4. Enter the number of miles that may be logged in between maintenance due dates as the **Distance Interval**
5. Enter the number of days that may pass in between maintenance due dates as the **Days Between Service**
6. Check the **whichever comes first** option if you would like either the **Distance Interval** or **Days Between Service** to determine service based on which occurs earliest. Uncheck the **whichever comes first** option if you would like either the **Distance Interval** or **Days Between Service** to determine service based on which occurs latest.
7. Repeat these steps for any maintenance items that need to be added.



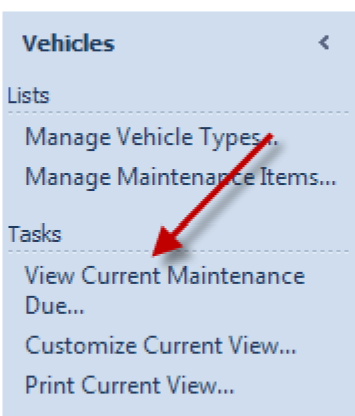
An example of an oil change in which the maintenance should occur every 3,000 miles or 3 months, whichever comes first

To Associate a Predefined Maintenance Item with a Vehicle

1. From the vehicle list, open the desired vehicle
2. Choose the **Maintenance** tab and click the **Add** button
3. Choose the maintenance item to be associated from the list and click **OK**
4. Click **OK** again to save the association to the vehicle

To View Maintenance Due for Vehicles

1. Click on the link labeled **View Current Maintenance Due** as shown here:



To Record Maintenance Performed on a Vehicle

1. From the vehicle list, open the desired vehicle
2. Choose the **Maintenance** tab and select the maintenance item that represents the maintenance performed

3. Click the **Record Maintenance** button
4. Enter the odometer reading and date when the maintenance was performed, along with any related notes
5. Click **OK** to save the record to the vehicle

Users

Users represent any person (manager, dispatcher, driver, et cetera) or entity (depot, warehouse, et cetera) employed by a business who should have access to that business's OnTime account.

Note: Users do not include customers or shippers. Only people and entities who work for *you* are considered users.

Any number of users can be setup under an OnTime account; however, if the allotted number of user accounts has been exceeded, additional monthly charges will be represented by the total number of billable users. Check the OnTime web site or contact Technical Support for information on the number of users allotted to certain accounts.

Additional user accounts are assessed on the first of each month; therefore, try to remove users *before* the end of the month and add new users *after* the first of the month.

User Properties

Five tabs are available under each user account: **General**, **Employment**, **Mobile**, **Comments**, & **Permissions**.

General

- **First Name** and **Last Name**: Enter the user's name into the **first name** and **last name** fields. If two names are not appropriate, enter the user's name into the **last name** field.
- **SSN**: Enter the user's social security number or other identifying number
- **EIN**: In the case of an agent or partner business, enter the employer identification number
- **Email**: Enter the user's email address to send notifications
- **SMS gateway**: Enter the email to SMS gateway address for the user's mobile device. This address is usually the mobile device's phone number, plus the carrier's domain for relaying text messages. For example, on AT&T, the SMS gateway address might be: 5415551234@txt.att.net. Utilize a search engine or contact the user's mobile provider if this information is not readily available.
- **Mobile number**: Enter the user's cellular phone number
- **Time zone**: Select the time zone that the user operates within
- **Allow user to receive instant updates via SMS text messages**: Check for the user to receive a text message when events related to the user occur within OnTime

Note: Checking the **Allow user to receive instant updates via SMS text messages** option can incur additional text message charges on users' mobile bills

- **User Image**: Select an appropriate image file to associate with the user's account
- **User name**: Enter a user name for the user. This name will be used to sign in to OnTime

- **Password**: Enter a password for the user. This password will be used to sign in to OnTime
- **Register as limited user account and prevent this user from logging in**: Checking this option stops the user from signing in to any OnTime software. Users with this option selected are kept in OnTime, but are *not billable*
- Program access:
    - **OnTime Management Suite (Manager)**: Select this option to allow the user access to the *OnTime Management Suite* program and administrator related activities
    - **OnTime Dispatch (Dispatcher)**: Select this option to allow the user access to the *OnTime Dispatch* program and dispatcher/order entry related activities
    - **OnTime Mobile (Driver)**: Select this option to allow the user access to the *OnTime Mobile* programs and driver related activities

Employment

Information entered into the Employment tab can be used to generate a compensation report, which can be utilized during payroll.

- **Hired date:** The date the user was added to the system or hired as an employee
- **Type**: The type of worker the user represents
    - **Employee**: Indicates that the user is an employee
    - **Subcontractor**: Indicates that the user is a subcontractor
    - **Company**: Indicates that the user represents an agent or partner company
- **Company name:** If the user represents a company, the name of the company

Note: User compensation is divided into two parts: dispatching orders or delivering orders. One, none, or both sections may be filled out, depending on the particular user's duties.

- **Dispatcher Hourly Rate:** Enter the hourly wage that the user is paid as a dispatcher. Leave set to zero (0) if the dispatcher is not paid an hourly wage.
- **Dispatcher Per-Order Rate:** Enter the amount that the user is paid per order dispatched. Leave set to zero (0) if the dispatcher is not paid by order.
- **Driver Commission Rate (%):** Enter the percentage of the total cost of an order that the driver is paid as a commission. Leave set to zero (0) if the driver is not paid on commission.
- **Driver Hourly Rate:** Enter the hourly wage that the user is paid as a driver. Leave set to zero (0) if the driver is not paid an hourly wage.
- **Driver Pay Price Set**: Enter the name of the customized price set to be used for automatic zone-to-zone compensation calculations. Leave set to "None" if the driver is not paid using this method. (For more information, see the Price Sets section in Chapter 4)
- **Driver Per-Delivery Rate:** Enter the amount that the user is paid per completed delivery. Leave set to zero (0) if driver is not paid a per delivery rate.
- **Mileage Rate:** Enter the amount that the user for is paid per mile/kilometer driven. Leave set to zero (0) if driver is not paid by distance.

Mobile

These options control the way that users experience *OnTime Mobile*:

- **Hide unassigned orders**: Checking this box denies the user access to the unassigned orders list from a mobile device. This option will prevent the user from accepting orders that have not been dispatched.
- **Start GPS automatically if available**: At startup, OnTime Mobile will attempt transmission of the user's position via GPS (if GPS is available in a compatible format on the mobile device). We recommend selecting this option to track the positions of drivers.
- **Disable customer lookup**: Check this box to prevent the user from searching for customer contact details in the database.
- **Show order prices**: Check this box to allow the user to view the total prices of an order
- **Enable editing of general order properties**: Check this box to allow the user to edit certain properties of orders directly from a mobile device: Requested By; Quantity; Weight; Height; Width; Depth; Status Label; Description; Comments.

Comments

The **Comments** box provides a place to make notes about the user. These comments are private.

Permissions

The **Permissions** tab displays a list of different tasks throughout OnTime. Uncheck any tasks that the user should not have access to.

Editing and Removing a User

Double-click a specific user on the list to edit that user. All edits made will take effect system wide. Right-click a specific user on the list and choose **Delete** to remove that user. Removing a user will not delete information linked to the user.

Customers

OnTime has a sophisticated customer account feature which allows price adjustments, order confirmation preferences, price set assignments, billing cycles, and department association.

General

This tab is for basic customer information that is used for orders placed within OnTime.

- **Name:** Enter the customer's name (a business or personal name)
- **Contact:** Enter the name of the primary contact at this customer's location
- **Account #:** Enter the customer's account number. If appropriate, this number is used by the customer to log in to the online customer portal
- **Phone:** Enter the customer's phone number
- **Fax:** Enter the customer's fax number. Filling out this section allows invoices to be faxed
- **Email:** Enter the customer's email address. This email address will receive notifications and, if appropriate, be used by the customer to log in to the online customer portal
- **Street 1:** Enter the first line of the customer's address.
- **Street2:** Enter the second line of the customer's address
- **City:** Enter the city of the customer's address
- **State:** Enter the state of the customer's address
- **Postal code:** Enter the postal code of the customer's address
- **Country**: Enter the country of the customer's address
- **Website:** Enter the customer's web site address
- **Categories**: Enter a list of categories that the customer may belong to. Separate items with commas. This list is used for reference only.
- **This customer is active**: If this option is unselected, the customer will not be able to log in to the *OnTime Customer Web Portal.* Dispatchers will be alerted in *OnTime Dispatch* when attempting to create a new order for an inactive customer
- **Create a location record for this customer**: This option is available when creating a new customer account. If checked, a corresponding location record will be created
- **Configure Required Fields**: Click this button to view a list of fields that can be made mandatory. To require a field to be filled upon order entry, place a check box next the desired field(s). Click **OK** to save the changes. The selected fields will be required in both *OnTime Dispatch* and the *OnTime Customer Web Portal* before an order may be submitted for the associated customer. Setting the required fields here takes affects the configured customer only. Other customers will not be required to fill out the same fields.

Note: If globally required fields have been setup from the General Options area, those fields will be merged with required fields for a specific customer.

Departments

This section is used to manage departments used by the customer. These departments will appear in the order entry forms, allowing the customer to indicate which department is involved in the order. This information is used on the invoice report to group the invoice by department.

Contacts

This section is used to manage the contacts, or subaccounts, under a customer. Creating additional contacts under a customer account allows the customer to have various individuals place orders and receive notifications *personally,* instead of at the company level.

An email address and password are requested for each new contact. These credentials can be used by the contact to log in to the *OnTime Customer Web Portal*. Orders placed by a logged in contact will remain associated with that contact. Notifications regarding that order will be sent to the contact's email address.

Notifications

OnTime allows specific notifications to be sent to specific customers. Custom information, such as proof of delivery, may be included in these individualized notifications. When creating these notifications as templates in the OnTime **Workflow Designer**, one of the options is to set the **scope**. Set the **scope** is set to "Customers" to have the notification template available in this list. Check the notifications that you would like to have relayed to the customer.

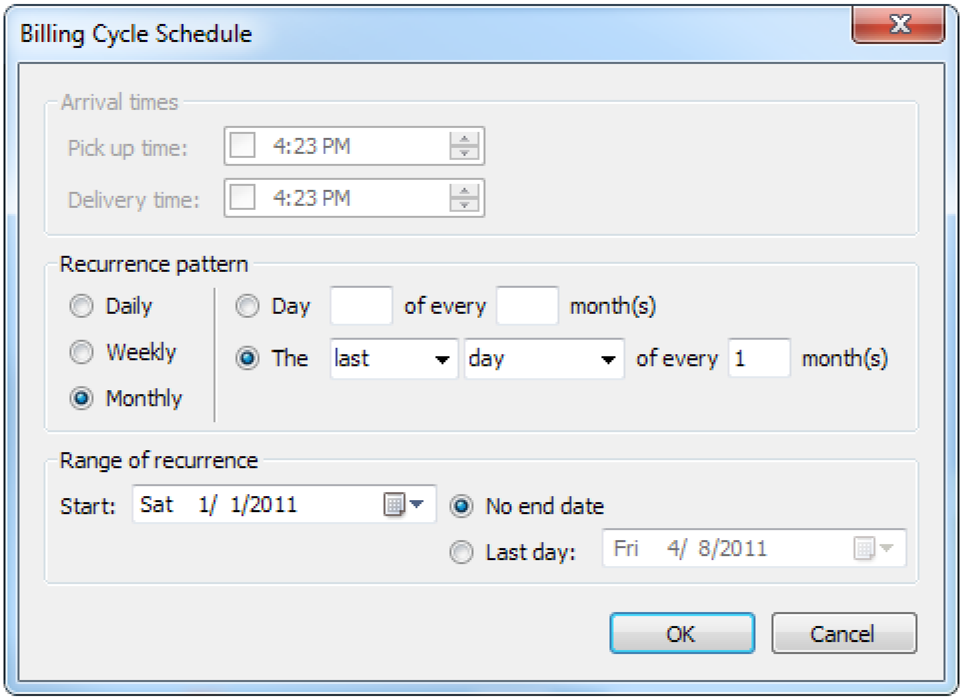
Price Sets

To make one price set the default for new orders, right-click the desired price set and select **Set as Default Selection**. A green check mark will appear next to the default price set.

Billing

This section is used to set billing options for the customer.

- **Set Billing Cycle**: Click this button to set how often billing occurs for the customer. The results will be displayed in the billing area of the program. Clicking this button will display a flexible scheduling window. For example, if you would like the billing cycle to be once a month, ending on the last day of the month, the schedule would appear like this:



Note: Billing cycles may only occur once per period. For example, a schedule of once every 2 weeks may be set, but not a schedule of twice a month on the 1st and 15th.

- **Clear Billing Cycle**: Select this option to clear the schedule for the billing cycle; no schedule will be used
- **Send invoices via**: Use these check boxes to set preferences regarding invoices sent to the customer
- **Billing email**: Enter the email address to which invoices will be sent
- **Adjustment:** If desired, enter a positive or negative value (representing a percentage) to adjust the price by. A negative value can be indicated by placing a negative symbol (-) before the number
- **Reference number**: The number in this field is the default reference number. This number will be automatically placed on new orders for the customer
- **Purchase order number**: The number in this field is the default purchase order number. This number will be automatically placed on new orders for the customer.
- **Preferred pricing method**: Set this preference to correctly correspond with the specific customer's pricing type. The pricing type can be changed in *OnTime Dispatch* upon order entry; however, this value is not adjustable from the *Customer Web Portal*. The default for all new customers is **distance based**
- **Credit card information**: This section lists the credit card information for the selected customer. This data is stored in an encrypted state, but may be viewed by anyone who has access to customers in *OnTime Management Suite*. This data is stored for reference only and is not used to process payments through OnTime.

The Importance of Customer Credit Card Protection

If you store, process, or transmit credit card payments, your business could be liable for fines or other damages if your customers' credit card information is ever stolen or compromised.

The merchant is responsible for the security of any credit card information that is stored, processed, or transmitted within OnTime.

OnTime, as a payment application program that handles payment cards, must comply with the requirements for securing cardholder data.

Security standards are governed by the PCI DSS (Payment Card Industry Data Security Standard) to make sure that payment card data is protected and secure. Failing to comply with these standards can lead to a security breach that could result in significant fines. See the Visa Cardholder Information Security Program for further details.

As a merchant, you are required to maintain secure credit card information handling standards within OnTime as well as outside of OnTime. Please review the steps involved in complying with the standards as outlined in the Payment Card Industry (PCI) Data Security Standard (DSS).

Customer Web Portal

To log in to the *OnTime Customer Web Portal,* the customer must have the following fields filled.

- Grant this customer access to the OnTime Customer Web Portal: Check this box to allow the customer to log in
- **Email**: This section contains the email address from the **General** section of the customer's record. This email address can only be changed in the General section
- **Password**: Enter the password used by the customer to log in.
- **Time zone**: Set the time zone for the customer
- **Log in to the web portal as this customer**: Select this option to launch a web browser, open the *OnTime Customer Web Portal*, and log in as the selected customer.
- **Send customer a link to the Customer Web Portal via email**: Select this option to compose an email in the default email program. The email will contain the web site address, user name, and address that the customer will need to access the *OnTime Customer Web Portal*. A default email program, such as Microsoft Outlook, must be installed and configured correctly for this option to work.

Note: The *OnTime Customer Web Portal* is only available to Enterprise level subscribers. See Chapter 6: OnTime Customer Web Portal for more information about this feature.

Map

This section displays a map of the customer's location based on the address listed in the **General** section.

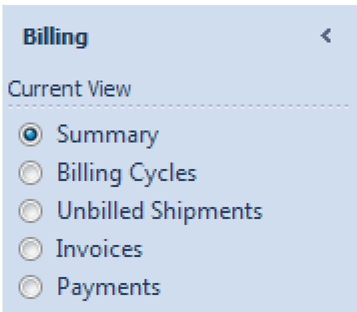
Comments

The **Comments** box provides a place to make notes about the customer. These comments are kept private and are never displayed to the customer.

Billing

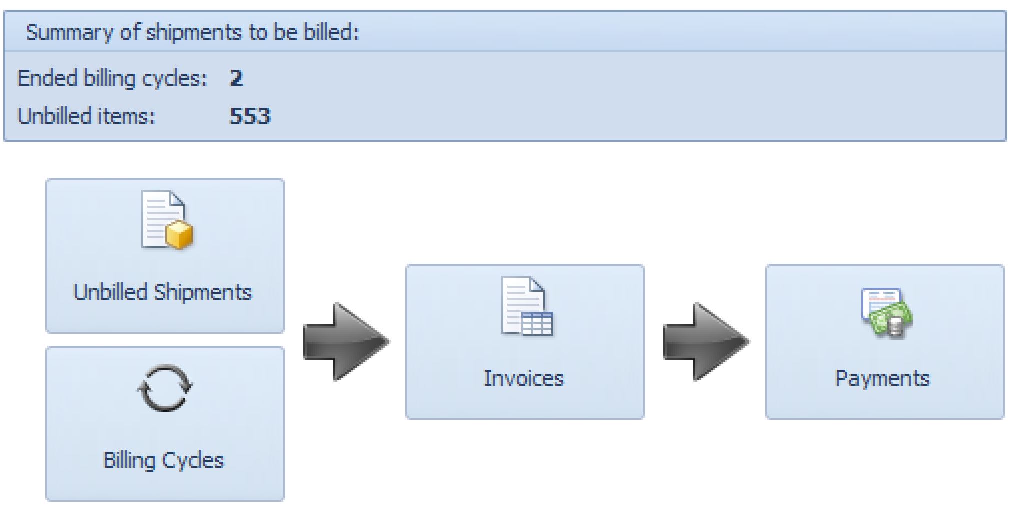
OnTime can help to organize billing across thousands of customers. Billing procedures that can take days to complete may be automated within OnTime by utilizing such features as billing cycles and batch mailing.

The **Billing** section contains five areas:



Summary

The **Summary** area provides an overview of the **Billing** section. Total **Ended billing cycles** and **Unbilled items** are provided, as well as shortcuts to specific parts of **Billing**.



- **Ended billing cycles:** The total number of billing cycles assigned to customers that have ended and are ready to be processed
- **Unbilled items:** The total number of orders that have been submitted, but not marked as billed to the customer

Billing Cycles

The **Billing Cycles** list displays customers who are assigned to a billing cycle that has been completed at least once. The list shows the last time that a bill was generated for the customer and all orders involved in the billing cycles were marked as billed.

The **current cycle ending** date is the last day of the cycle, including all unbilled orders submitted prior to and including that date.

The **total amount due** shows the total of all unbilled orders submitted prior to and including the ending date.

Postal, **email**, and **fax** columns display a check mark to indicate preferences of the customer to receive their bill in any one of those formats.

In the case where a billing cycle has reached completion more than once without being processed, the orders in all billing cycles up to the current one will be included.

Upon processing orders in a billing cycle, a message will appear asking if all processed orders should be marked as billed. All orders will be marked as billed, causing them to no longer appear in the billing area.

To Create an Invoice from a Billing Cycle

1. Select the desired billing cycle from the list
2. Click the button labeled **Add to Invoice**

All orders within that billing cycle will be added to a single invoice and marked as billed. The billing cycle entry will be removed from the list.

To Mark an Entire Billing Cycle as Billed

1. Right-click the desired customer billing cycle in the list
2. Select Mark as Billed

All orders included in the selected billing cycle will be marked as billed and will disappear from the list.

Unbilled Shipments

The **Unbilled Shipments** list displays all unbilled orders that have a status of *completed* or *cancelled billable*.

The column labeled **Created** represents the date and time that the order was submitted into the system. The amount represents the total cost of the order, including base price and price modifiers.

Double-clicking on an order in this list will open the order's details for editing.

Options to view and send information about a selected order are available in the toolbar across the top of the **Unbilled Shipments** list:

- **Preview**: Displays the selected order(s) in a printable report format
- **Print**: Prints the selected order(s) to a specified printer
- **Email**: Sends the selected order(s) to an email address. The customer's email address (if specified) will be automatically loaded and displayed for confirmation. If necessary, the email address may be changed before sending. The bill is attached to the email as an Adobe Acrobat PDF file. Further customization to this email is accessible via the **Email** tab in **General Options**.
- **Fax**: Faxes the selected order(s) to a fax number. The customer's fax number (if specified) will be automatically loaded and displayed for confirmation. If necessary, the fax number may be changed before sending.

To Create an Invoice from an Unbilled Shipment

1. Select one or more desired shipments from the **Unbilled Shipment** list
2. Click the button labeled **Add to Invoice**

All selected orders will be added to a single invoice and marked as billed. The selected shipment(s) will be removed from the list.

Note: Orders from different customers cannot be merged onto the same invoice. All orders on an invoice must belong to the same customer.

Filter and Grouping

By default, the **Unbilled Shipments** list only shows orders that have not been marked as billed. To see all orders, including ones that have been marked as billed, de-select the filter button:

Note: If the same order is added to more than one invoice, OnTime will display a warning to help to avoid double billing customers.

The button to the right of the filter will group unbilled shipments by customer name, which help when assembling invoices.

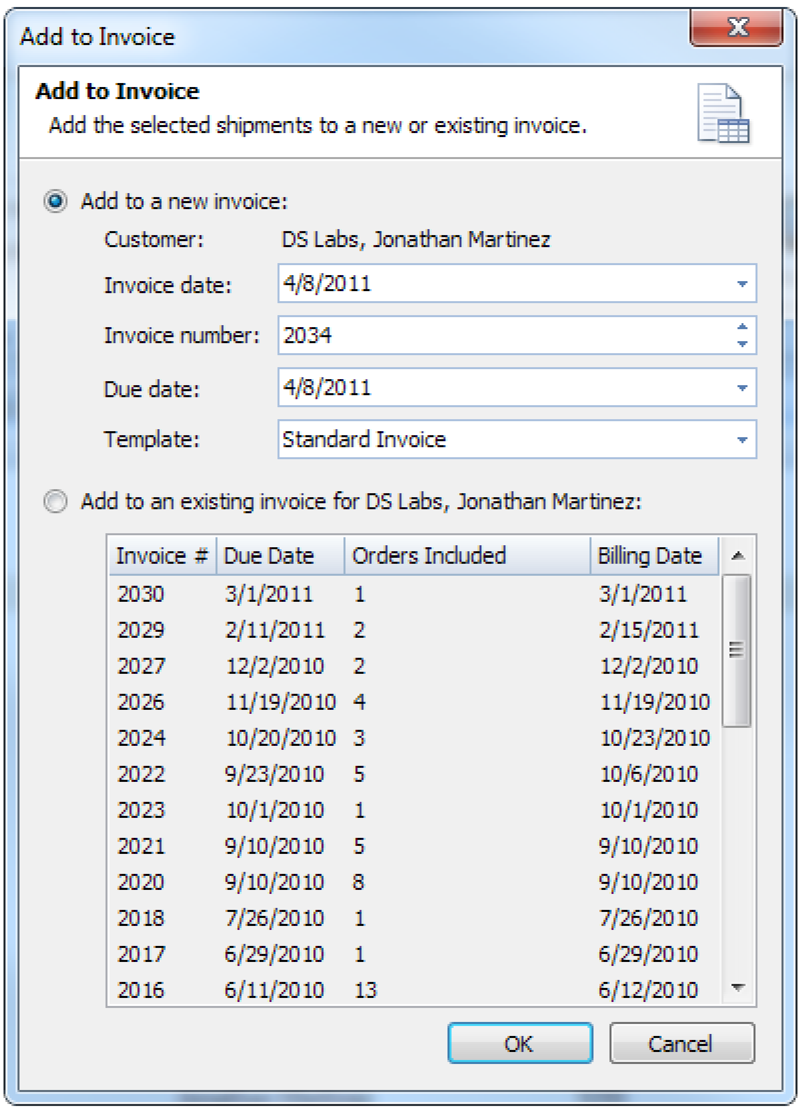
To Mark an Individual Order as Billed

1. Select the desired order in the list
2. Right-click and select **Mark as Billed**

The order will be marked as billed and will disappear from the list.

To Create a New Invoice

1. Right-click an unbilled order
2. Select **Add to Invoice**. A window will appear:



3. The window is separated into two portions: upper and lower. The lower portion, titled **Add to an existing invoice for…**, is used to modify existing invoices. The upper portion, titled **Add to a new invoice**, is used

to create new invoices. Fill out the following sections as needed to create a new invoice from **Add to a new invoice**:

- **Invoice date**: This section automatically indicates the date that the invoice is generated. The default is the current date. Adjust this section to display an alternative date to the customer.
- **Invoice number**: This section contains a sequential number that identifies the invoice. OnTime will automatically generate a number, which can then be accepted or altered manually.
- **Due date**: This section contains the date that payment on the invoice is due
- **Template**: Choose the template to be used to render this invoice:
    - **Standard**: This option will utilize a full invoice template with several details per order. Approximately three orders will fit on one printed page.
    - **Simplified**: This option will utilize a basic invoice template with only a few details per order. Several orders will fit on one printed page.

To Make Changes to an Existing Invoice

1. Double-click the desired invoice in the list
2. Make any desired modifications
3. Click Save & Close

To Remove an Order from an Invoice

1. Right-click on the order
2. Choose remove from invoice.

Viewing and Sending Invoices

OnTime supports four methods for outputting invoices: Preview, Print, Email, & Fax.

Preview

A print preview can be displayed on screen, displaying exactly what the customer will see. From here, modifications may be made to the layout and the invoice may be saved to many file formats, including PDF.

Print

Use this option to send the invoice directly to a printer.

Email

This option will create a PDF file of the invoice and attach it to a message addressed to the billing email address on file for the appropriate customer. An OnTime administrative user will be prompted to confirm the email address and name of the recipient before the email is sent.

Fax

This option will create a fax version of the invoice and send it to the fax number on file for the appropriate customer. An OnTime administrative user will be prompted to confirm the fax number and name of the recipient before the fax is sent.

Posting Invoices to QuickBooks

OnTime can connect directly to QuickBooks and export invoice data. Please see the Connecting to QuickBooks, Sending Transactions to QuickBooks, and Customize the Information on QuickBooks Invoices sections later on in this guide for more information.

Processing Received Payments

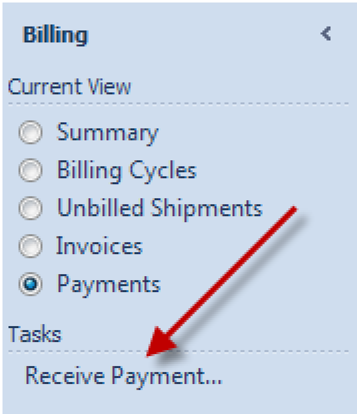
Recording customer payments in OnTime can help to keep track of customers' balances.

Posting Payments to QuickBooks

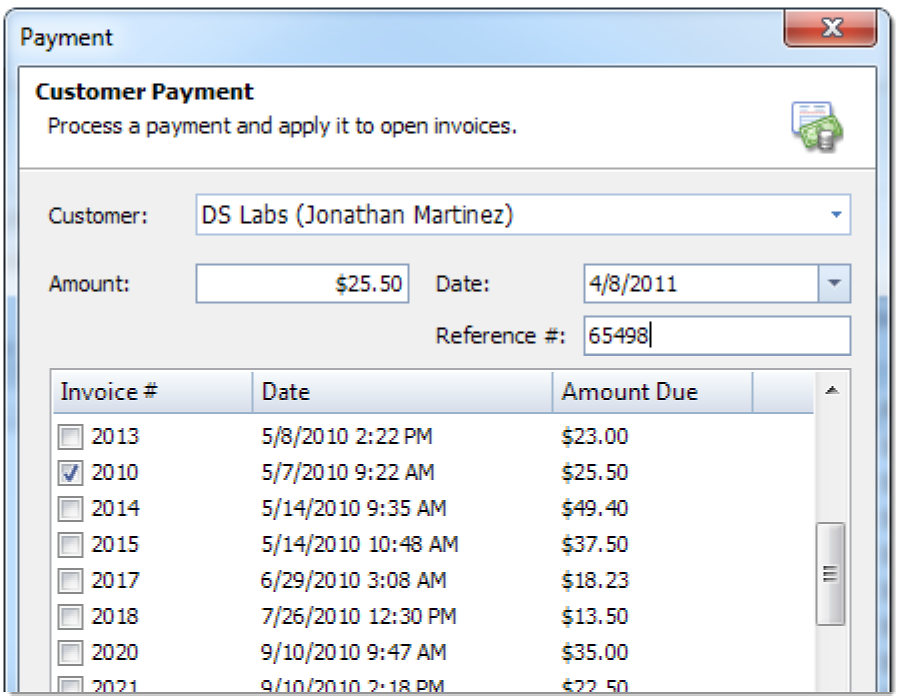
OnTime can connect directly to QuickBooks and export payment data. Please see the Connecting to QuickBooks, Sending Transactions to QuickBooks, and Customize the Information on QuickBooks Invoices sections later on in this guide for more information.

To Post a Payment

1. Click the **receive payment** link:



2. In the resulting window, select which customer made the payment; all open invoices will be listed.
3. Check the invoice associated with the payment. If the payment applies to multiple invoices, split the payment by manually reporting multiple received payments.



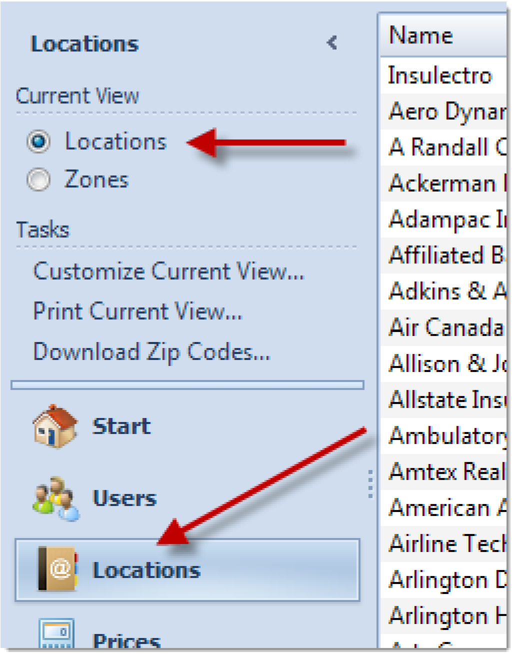
4. Click the **Save & Close** button.

Once an invoice has been paid in full, that invoice will no longer appear in the "open invoices" list.

Locations

OnTime maintains a list of locations which help to keep track of all of the addresses that have been serviced in the past. These addresses are tagged with information such as the zone they belong to and the longitude/latitude coordinates. All addresses used by OnTime will be stored in the **Locations** list.

To access this list, click the **Locations** navigation button and select **Locations** as the view type:



Location records include the following fields:

- **Name:** The name of the location (business or personal name)
- **Contact:** The name of the primary contact at the location
- **Phone:** The location's phone number
- **Email:** The location's email address. Notifications may be sent to this address.
- **Categories**: A of categories that the location may belong to. Separate items with commas. This list is used for reference only.
- **Zone:** The zone associated with the location. If unassigned, OnTime will automatically attempt to assign a zone based on the postal code.

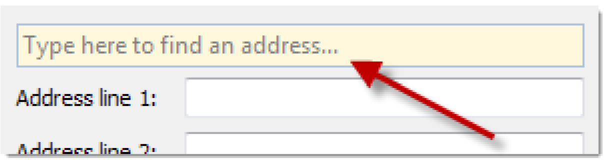
Note: When using zone-to-zone pricing, be sure that the **Zone** assignment is made.

- **Position**: If the location has been successfully geocoded, the longitude and latitude of the location will appear in this section. Right-click a location on the main list and select **Geocode** to reattempt geocoding at any time.
- **Address line 1:** The first line of the location's address.
- **Address line 2:** The second line of the location's address

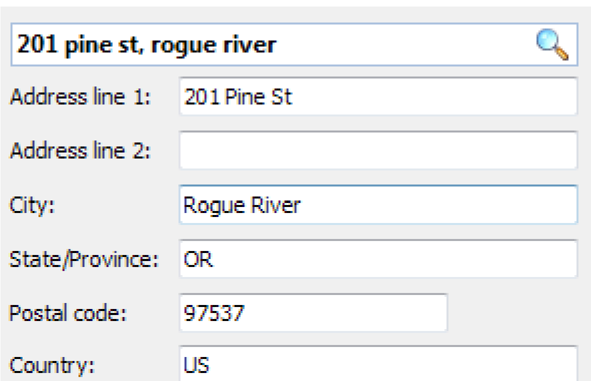
- **City:** The location's city
- **State/Province:** The location's state
- **Postal code:** The location's postal code
- **Country**: The location's country
- **Comments**: Private notes about the location may be entered in this section

Using the Search Box to Find Addresses

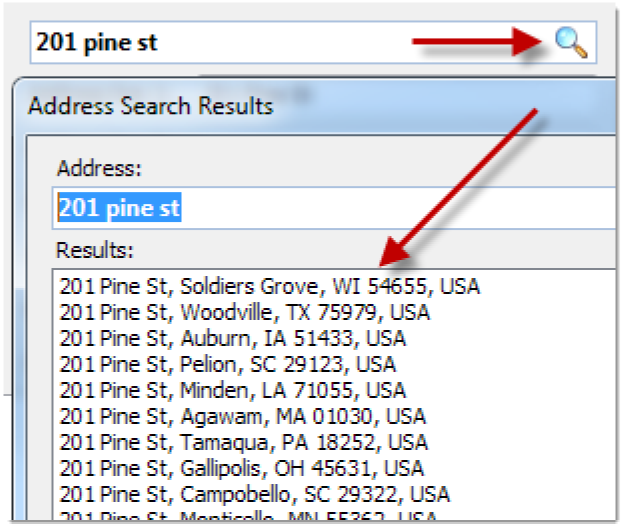
TIP: Save time by entering the first part of an address into the yellow search box:



The address will be properly formatted and geocoded, allowing for mileage calculation to and from the address. For example, by typing in the street and city, OnTime automatically formats and fills out the whole address:



If an ambiguous address is typed in, OnTime may find multiple matches. In such cases, click on the search icon to view all possible matches:

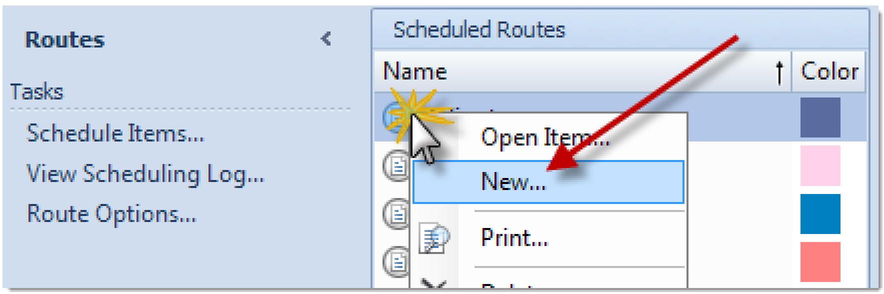

201 pine st
Address Search Results
Address:
201 pine st
Results:
201 Pine St, Soldiers Grove, WI 54655, USA
201 Pine St, Woodville, TX 75979, USA
201 Pine St, Auburn, IA 51433, USA
201 Pine St, Pelion, SC 29123, USA
201 Pine St, Minden, LA 71055, USA
201 Pine St, Agawam, MA 01030, USA
201 Pine St, Tamaqua, PA 18252, USA
201 Pine St, Gallipolis, OH 45631, USA
201 Pine St, Campobello, SC 29322, USA

Routes

OnTime Management Suite allows frequent stops and driver schedules to be organized into routes. A route is assigned to a specific driver. Each day, the route is evaluated and all stops that are scheduled to occur on that day are assigned to the driver as orders. The driver can then see these orders from *OnTime Mobile*.

To Create a New Route

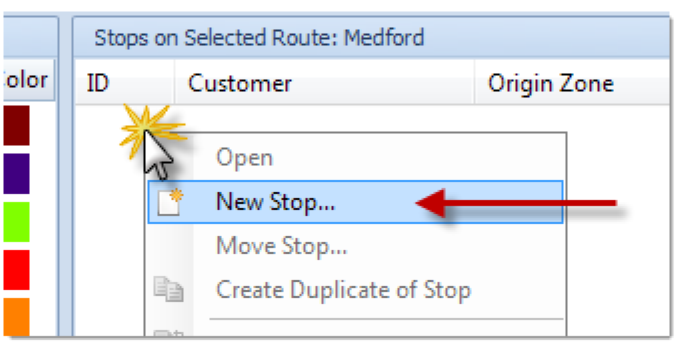
1. From the **Routes** area, right-click in the center column and select **New**:



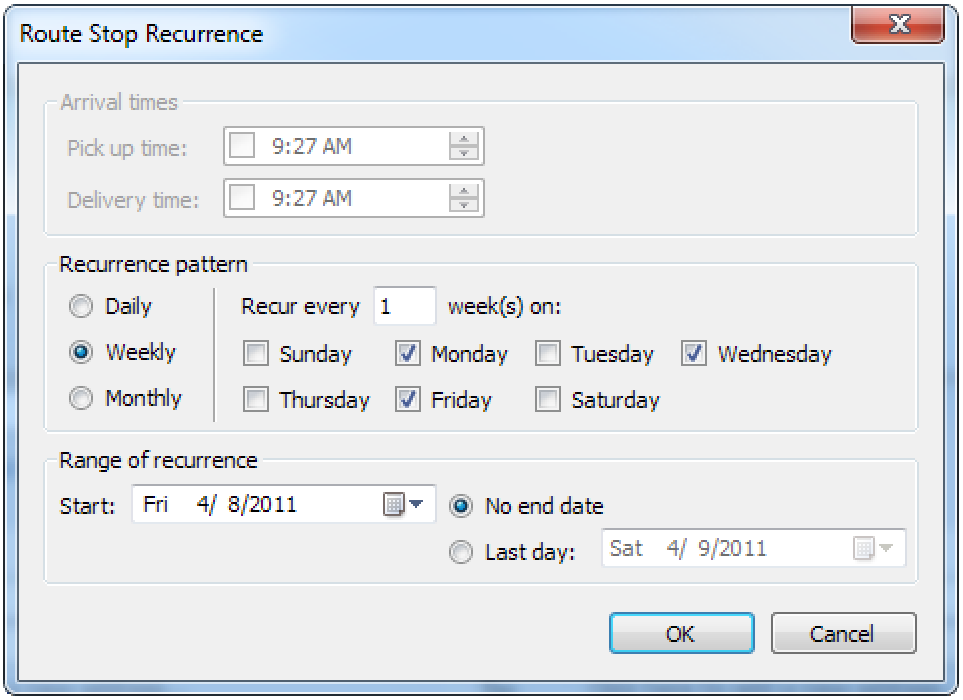
2. Assign a **Route Name** and a **Driver** to the new route.
3. Select a **Color** to differentiate the new route from other routes (when all are displayed together).
4. Check the box **this route is actively scheduled** to queue it for daily evaluation during scheduling. Uncheck this box to temporarily suspend the scheduling of a route.

To Add a Route Stop

1. Right-click in the desired route's stops list and choose **New Stop**:

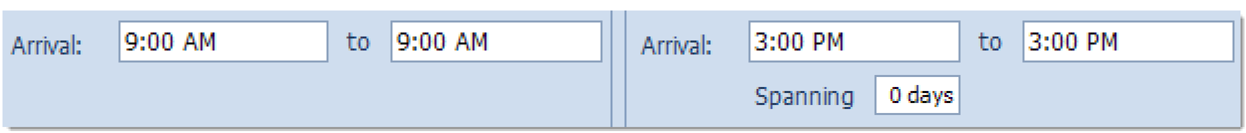


2. Fill out the order as completely as possible in the resulting window. Be sure to specify a **Customer**, **Service Level**, **Description**, **Options**, and **Collection/Delivery Locations**.
3. Set the **Schedule** to match the needs of the route stop.



This schedule would schedule the route stop to occur every Monday, Wednesday, and Friday

4. Specify the time of day that the route stop should occur under the collection and delivery location, as shown here:



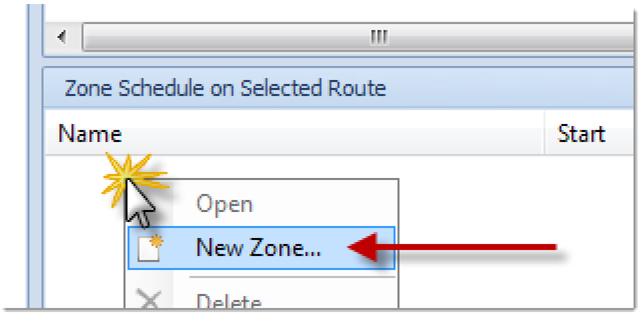
5. If the specified delivery will occur over multiple days, set the **Spanning** box to reflect that number of days
6. Click on the **Advanced** button to specify additional detailed information about the route stop
7. Click **Save**

Using Occupied Zone Schedules

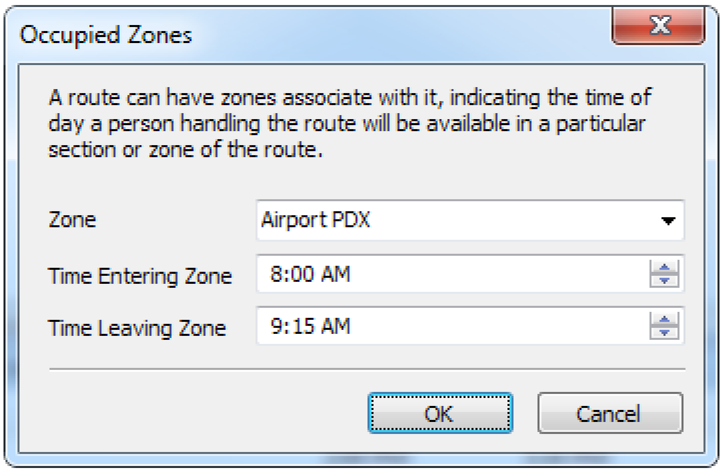
Occupied Zones represent the time of day the assigned driver is expected to be in particular zones. OnTime can consult this schedule later on when dispatchers need a recommendation for the appropriate driver for an order.

To Add a Zone Listing

1. Right-click in the box labeled **Zone Schedule on Selected Route**.
2. Select **new zone**:



3. Choose a zone.
4. Indicate when the driver is expected to enter and leave that zone.

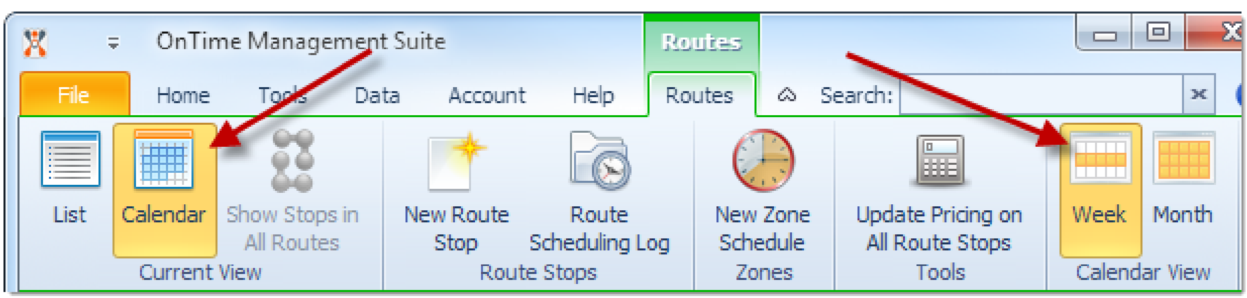


An example which indicates that the driver is expected to be in the Airport PDX zone for 1 hour and 15 minutes, from 8:00 AM to 9:15 AM

Managing Routes

Once several route stops have been added, a calendar visual showing how stops relate to one another will become available.

To access this calendar, click on the **Calendar** button and choose to view by **Week** or **Month**:



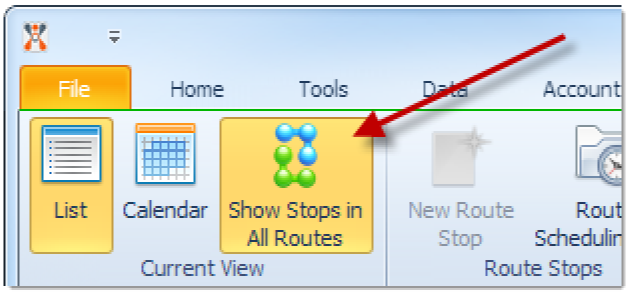
To Create Exception in a Schedule for a Given Route Stop from the Calendar View

1. Select the desired route stop instance
2. Drag that instance to a different date

To Skip a Single Instance of the Schedule

1. Select the desired route stop instance
2. Press the delete key on the keyboard

Show Stops in All Routes Button



Specifying different colors for each route can help to visually differentiate stops. In the view displayed after selecting **Show Stops in All Routes**, the stops may be redistributed by clicking-and-dragging a specific stop on to a different route.

Scheduling Routes

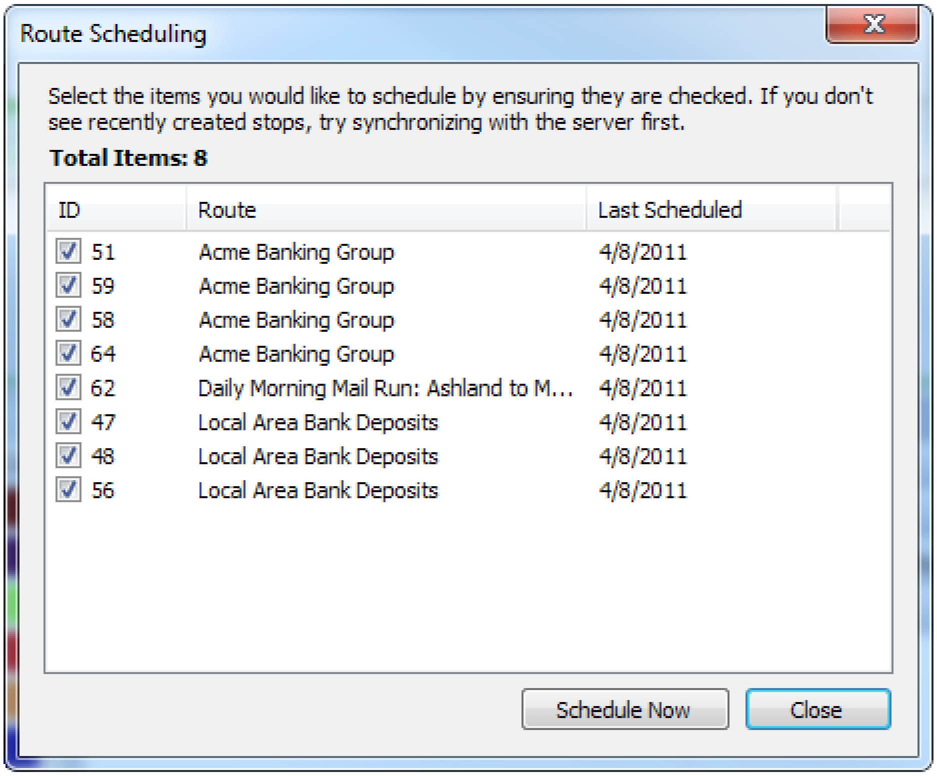
- To schedule a route stop more than once in a day, create additional route stops with appropriate schedules
- To schedule a route stop, OnTime considers the previous time that the stop was scheduled and then will determine if the stop should be added to the schedule that day. If the stop shouldn't be scheduled that day or has already been scheduled that day, the route will be skipped by OnTime.
- Scheduling is enacted either automatically or manually.

To Have Scheduling Done Automatically

1. Enter **General Options** in *OnTime Management Suite*
2. Select the **Routes** tab
3. Activate the Automated Route Scheduler
4. OnTime will automatically attempt to schedule all route stops once a day. Set the **time of day** that the scheduler should run. We recommend a time of 12:00 AM or soon after.
5. The **user identity** indicates which user automatically generated orders will have listed as the creator

To Have Manually Scheduled Route Stops

1. Check that OnTime is synchronized with the server
2. Click on the **schedule items** link. A list of route stops will appear. Route stops that have already been scheduled for that day will not reappear in this list.



3. Check the desired items in the list that to be scheduled
4. Click the **Schedule Now** button

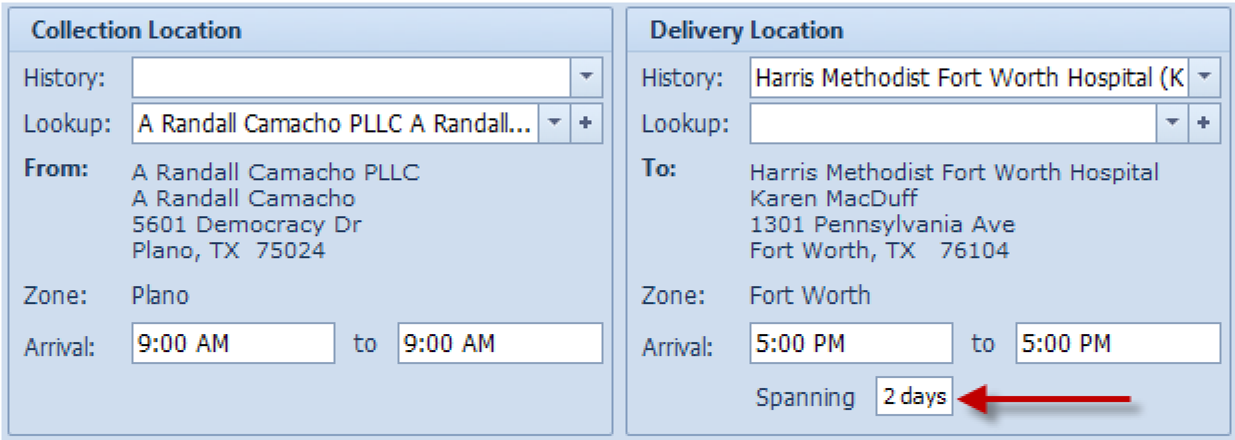
To View the Results of a Manual or Automated Scheduling

Click the **View Scheduling Log** link. A window will appear with a list of orders that have been scheduled, the routes stops that they originated from, and the tracking numbers assigned to those orders.

Scheduling Routes Stops Across Multiple Days

Route stops may span multiple days. OnTime makes this functionality possible by allowing the number of days that the route stop should span to be set.

This flexible approach will allow OnTime to calculate the total amount of time between the latest pickup time and the latest delivery time, plus the number of days. To continue using routes stops that are same-day, then enter zero (0) in the **Spanning** box. To have one or more days elapse in between the pickup and delivery times, enter the desired number of day(s) in the **Spanning** box:



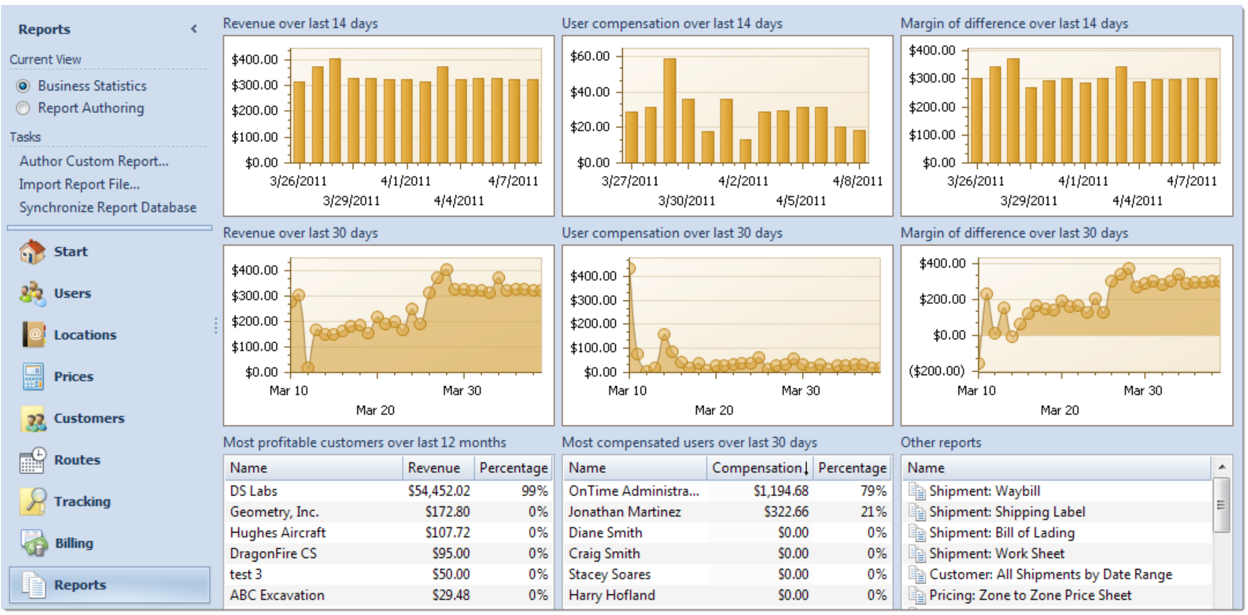
An example indicating that two day should elapse between pickup and delivery times

Reports

OnTime provides a number of pre-made reports. Alternately, OnTime provides a report designer for creating custom reports.

The Reports Area

The **Reports** area contains a dashboard with several key metrics for business revenue and user compensation. Graphs outline the data for the past several weeks of operation and include the date of each piece of data. Hover the cursor over a bar or dot on a graph to see the exact amount for that day.



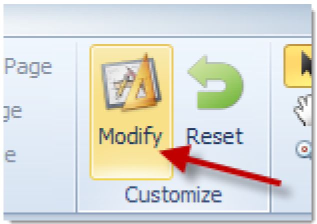
Near the bottom, three lists show the most profitable customers, most compensated users, and a list of other reports.

> **Note:** Double-click on an item in the **other reports** list to view instructions regarding how to locate that report within OnTime. You will find most reports within OnTime are provided contextually, meaning that they will tend to be in the same area as the subject of the report.

Modifying Existing Reports

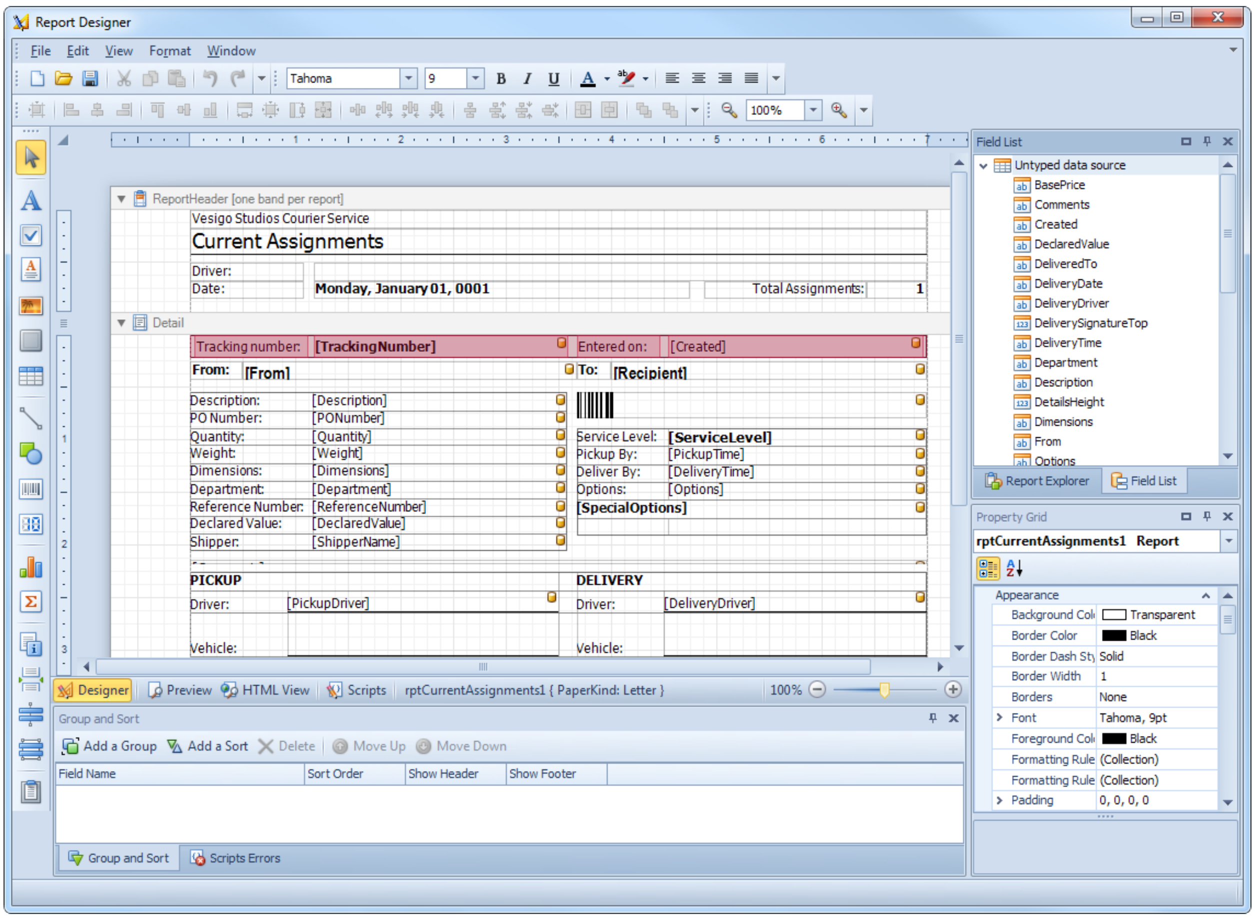
Modifications may be made to reports using the report designer built into OnTime.

1. Load a preview of the desired report. If the report may be customized, a **Modify** button will appear in the toolbar of the preview window as shown here:



Note: If the **Modify Report** button does not appear, the report cannot be customized.

2. Click the **Modify Report** button to launch the report designer.

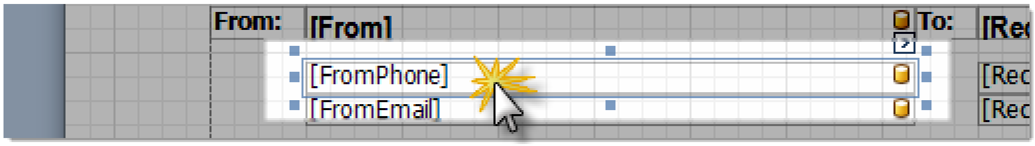


Formatting and Layout

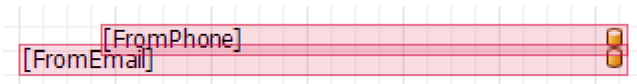
When a report is open in the report designer, all of the text on the report is outlined. Each piece of text sits within a text box or table. Moving those boxes or tables moves the text within to a different position on the report.

To Move a Box

1. Select the box on the report:



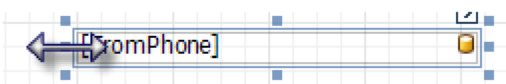
2. Blue squares will appear around the text box to indicate that it's been selected. The selected text box may be dragged and dropped to another position. If two boxes overlap, the report will color the overlapping boxes in red, as illustrated here:



Improper formatting should be corrected before saving the report.

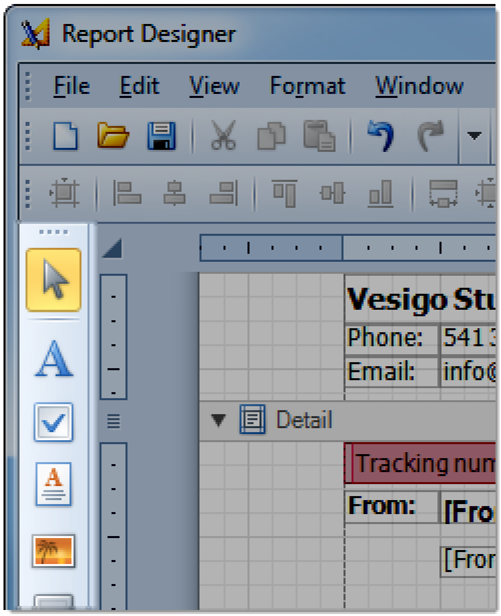
To Resize a Box

1. Select the box
2. Click on one of the blue dots around it
3. Drag:

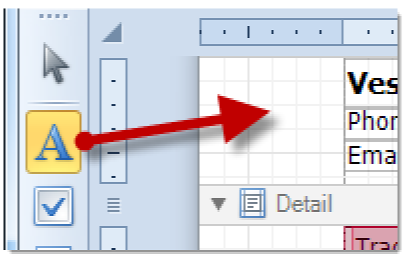


To Add Text and Images to a Report

Drag the desired element from the tool box on the left-hand side of the report designer window:

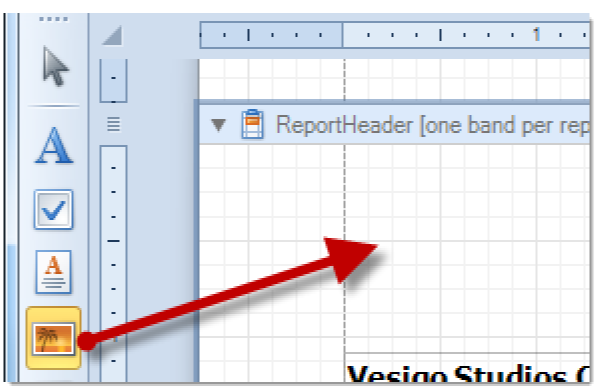


To add a text box, drag the label control onto the report:

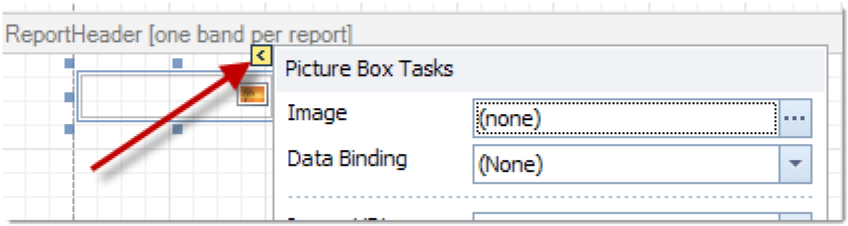


Double-click on a label within a report to edit the text.

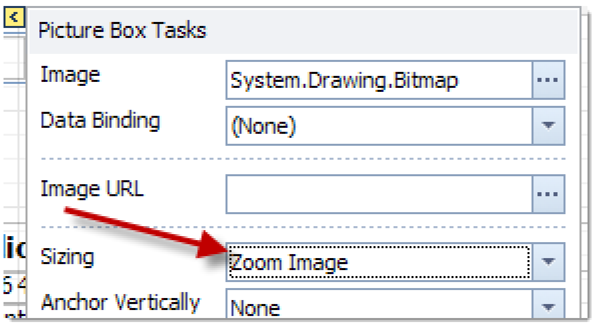
To add an image, drag the picture box control onto the report:



Click on the small arrow in the upper right-hand corner of the picture box within the report to open the smart tag:



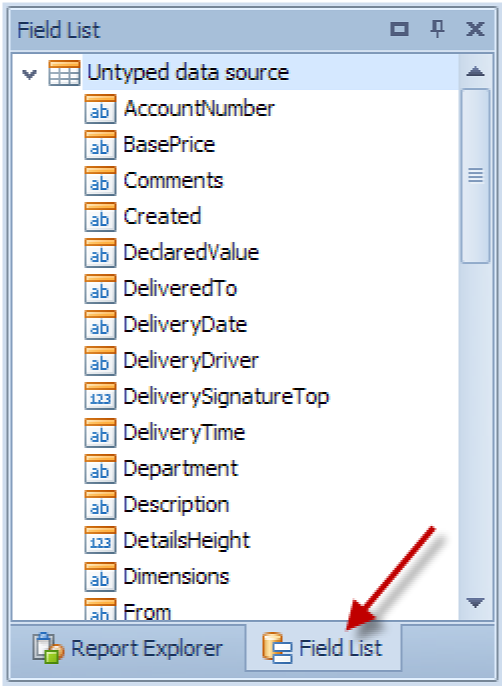
From this popup, browse to the desired image file and select it. We recommend setting the sizing mode to **Zoom Image**:



Zoom Image will automatically scale the image to fit inside of the picture box. The picture box may be adjusted to the desired size.

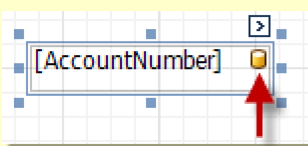
To Add Data Fields to a Report

1. Select the desired fields from the **Field List** on the right-hand side of the report designer:

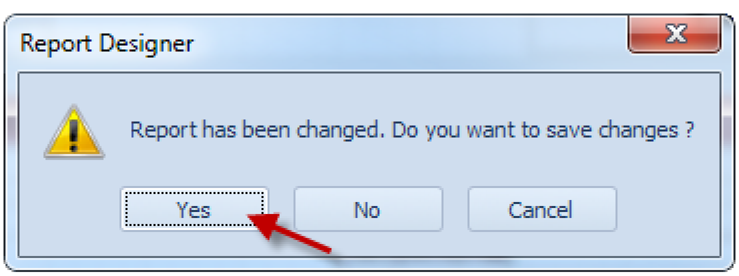


2. Drag the desired field from the **Field List** to the desired location on the report. Dragging fields on to the report will automatically create a label.

Note: To differentiate between these special fields and normal status labels, a small orange cylinder appears on data bound fields. The name of the data bound field will also appear in square brackets. *Do not edit this text.*



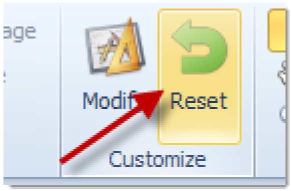
3. Exit the report designer and save changes once modifications are complete.



4. Exit the print preview window and reload the report to see modifications.

To Reset a Report to Default State

1. Open a preview of the desired report.
2. Click the **Reset** button in the ribbon of the preview window:



Authoring Custom Reports

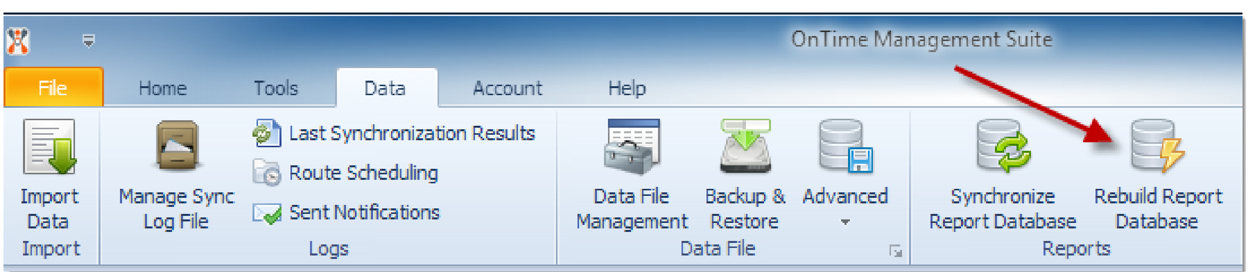
New reports may be made using the report authoring tools in OnTime.

> **Note:** Report authoring requires experience with report authoring tools, such as Crystal Reports or SQL Server Reporting Services. Knowledge of report layouts and formatting techniques is also necessary. In order to query the right data for the report, a good understanding of creating SQL queries is needed. Retain someone with these qualifications to make use of the report authoring tools.

To create a custom report, a report database must be built.

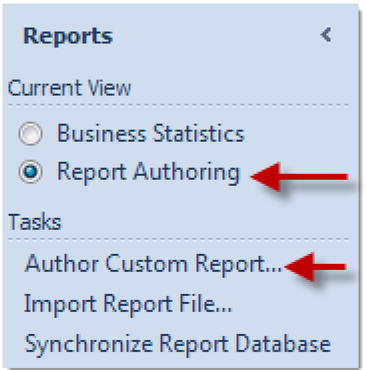
To Build a Report Database

1. Switch to the **Data** tab in the ribbon
2. Click **Rebuild Report Database**. Wait for this operation to complete before proceeding

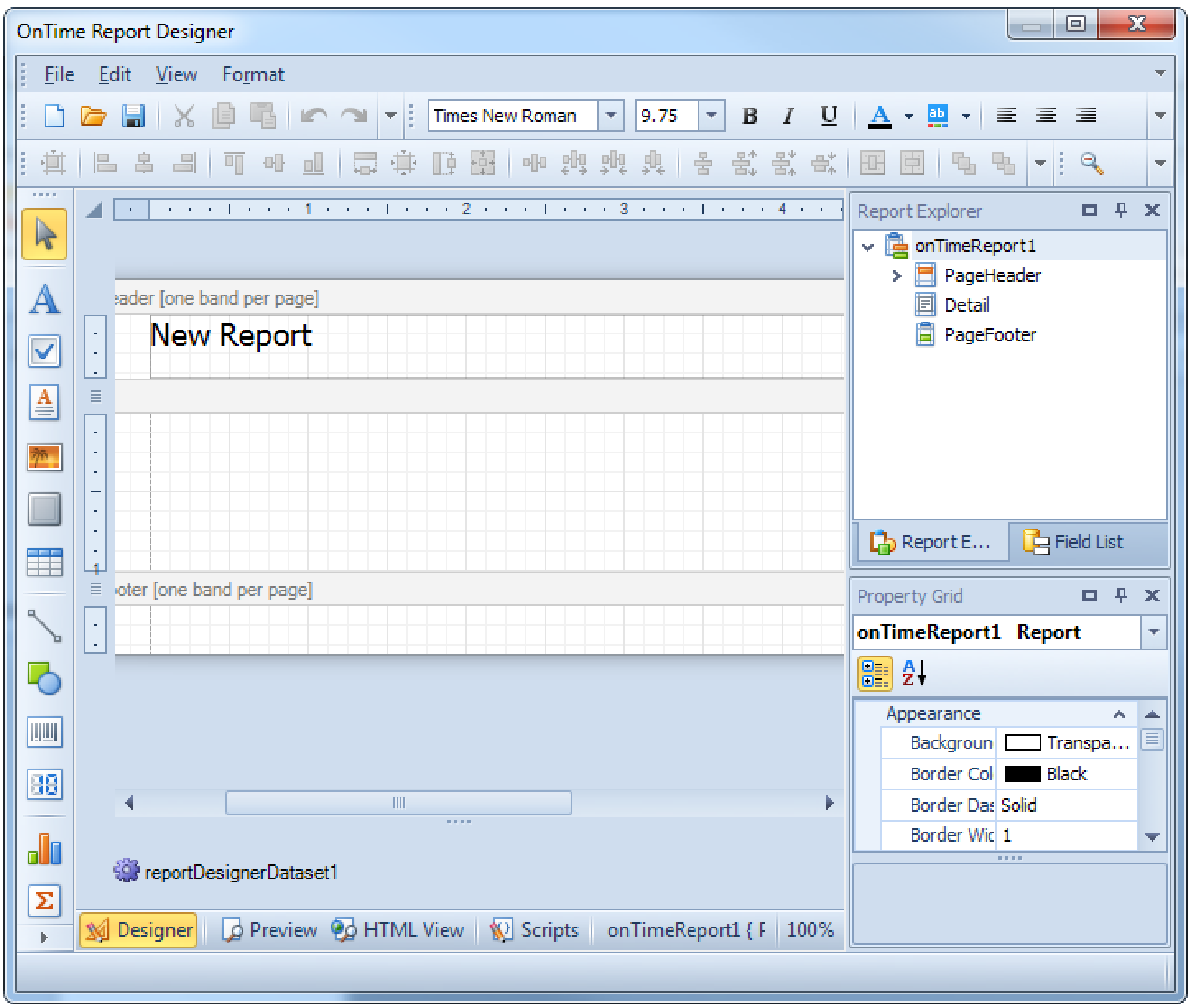


To Start a New Custom Report

1. Change the view to **Report Authoring**
2. Click the link labeled **Author Custom Report**

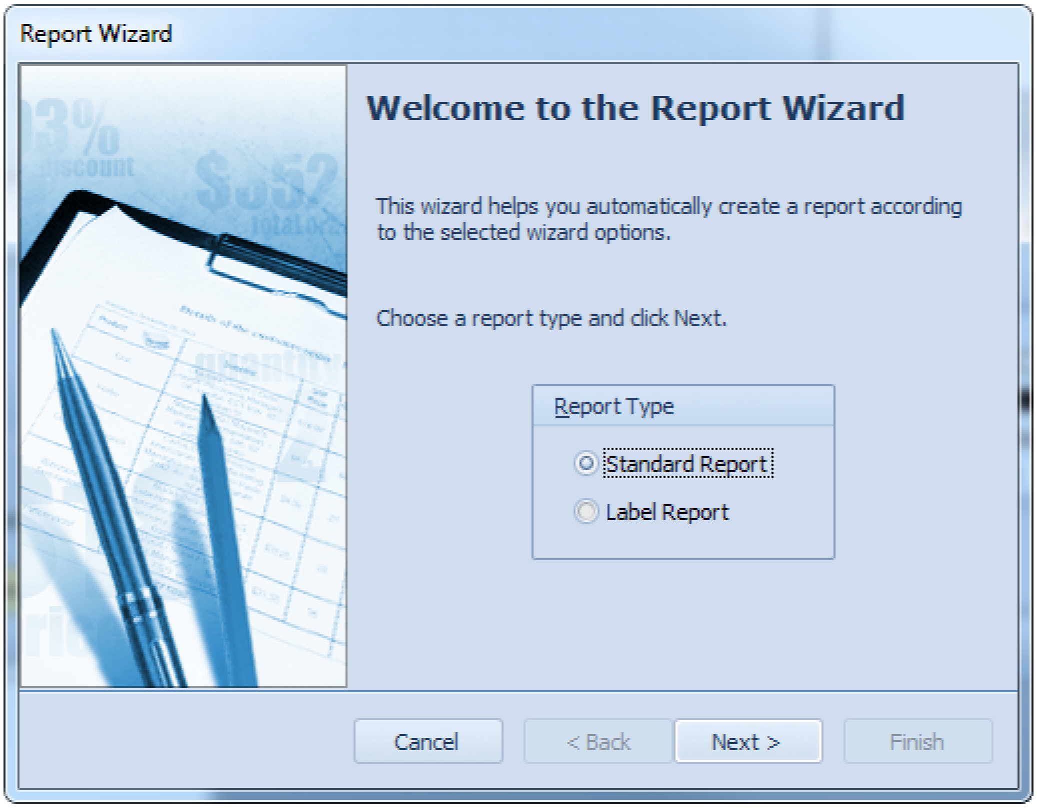


3. A blank report will open in a new report designer window:

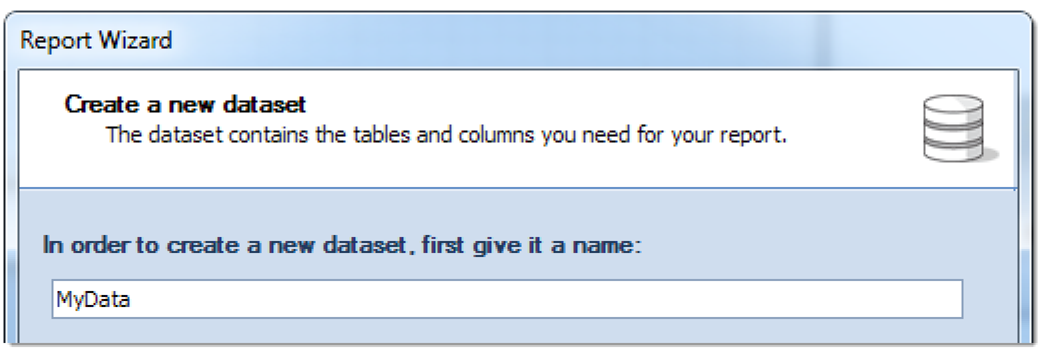


4. At this point, the easiest way to create a new report is to use the wizard. Start the wizard by clicking on the **File** menu and choosing **New with Wizard**.

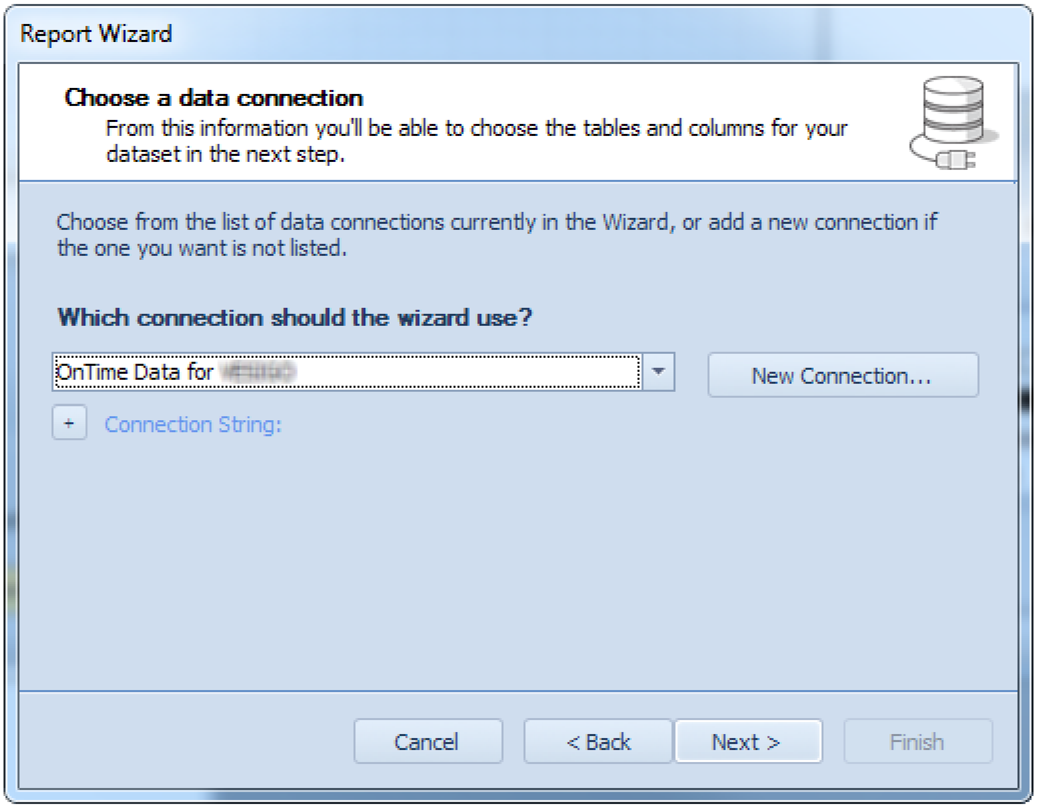
5. Create a standard report. Press **Next**.



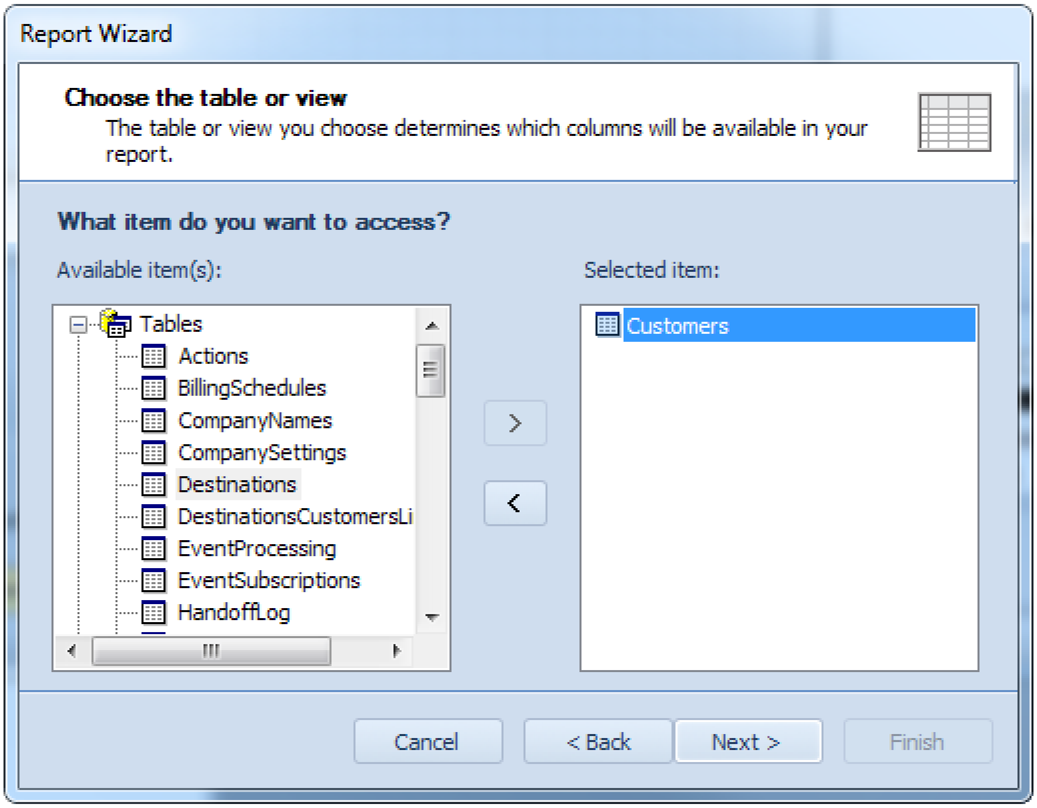
6. Enter the name to be used to identify the dataset. A dataset is the container, or set, of data that will be used in the report. Press **Next**.



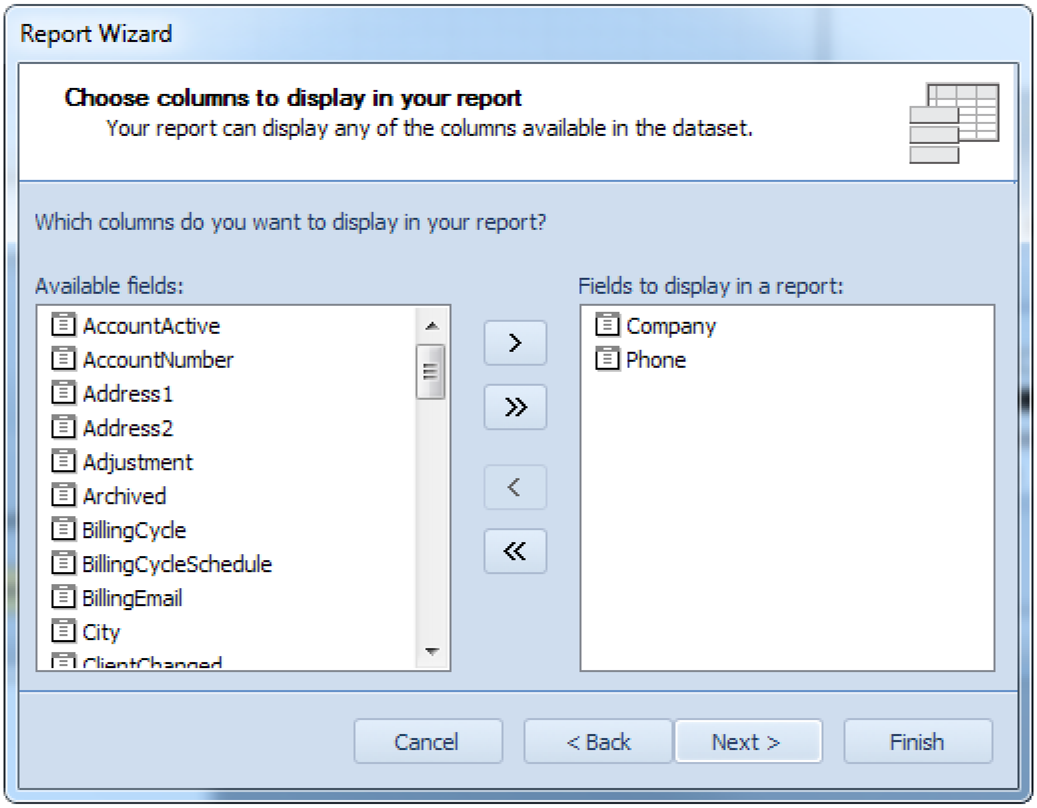
7. Accept the default connection. Press **Next**.



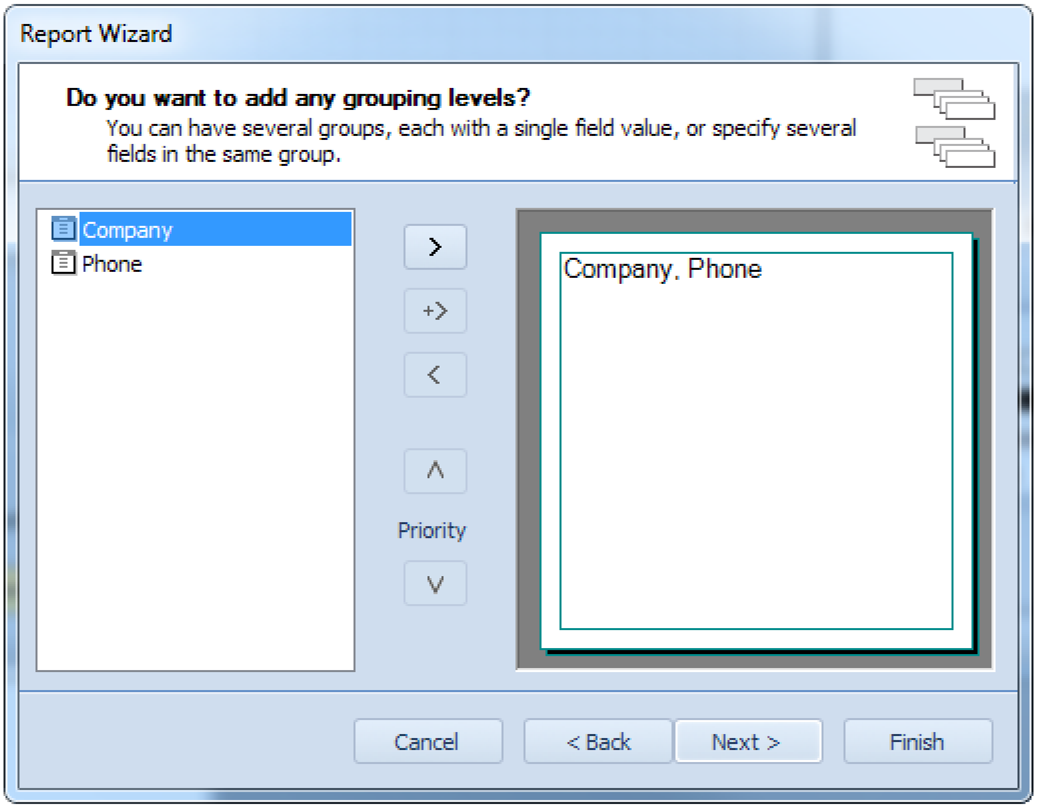
8. Available tables will be displayed in the database. Any tables that need to be referenced in the report should be added to the list on the right. Once all of the appropriate tables have been added, press **Next**.



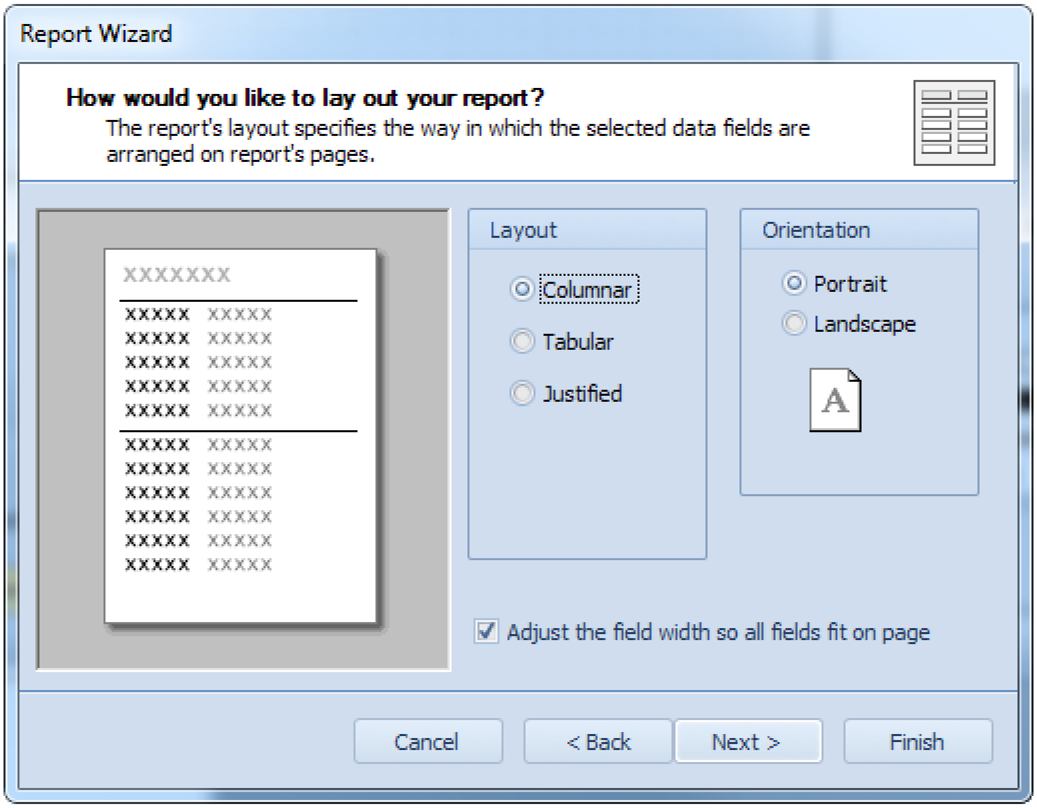
9. The fields from the table(s) selected in the previous step will be displayed. Any the fields that need to be referenced in the report should be added to the list on the right. Once all of the appropriate fields have been added, press **Next**.



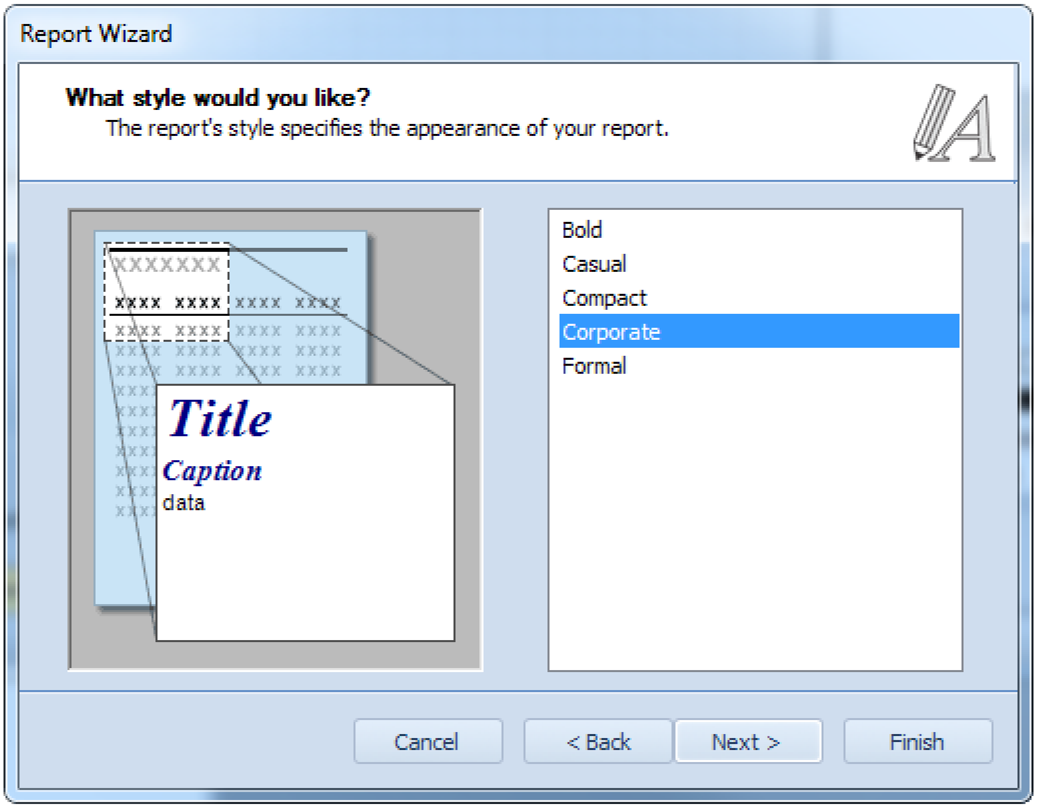
10. Group fields as necessary. Once grouping is complete, press **Next**.



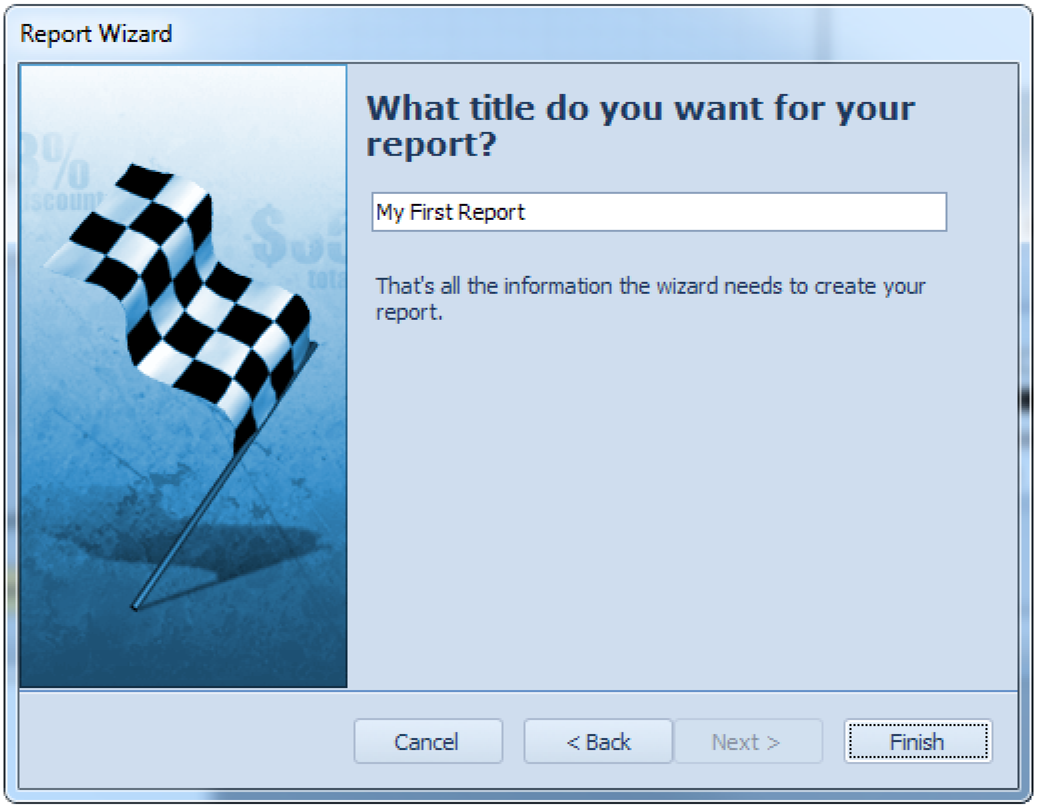
11. Choose the layout of the report. Keep the defaults to get a columnar layout. Press **Next**.



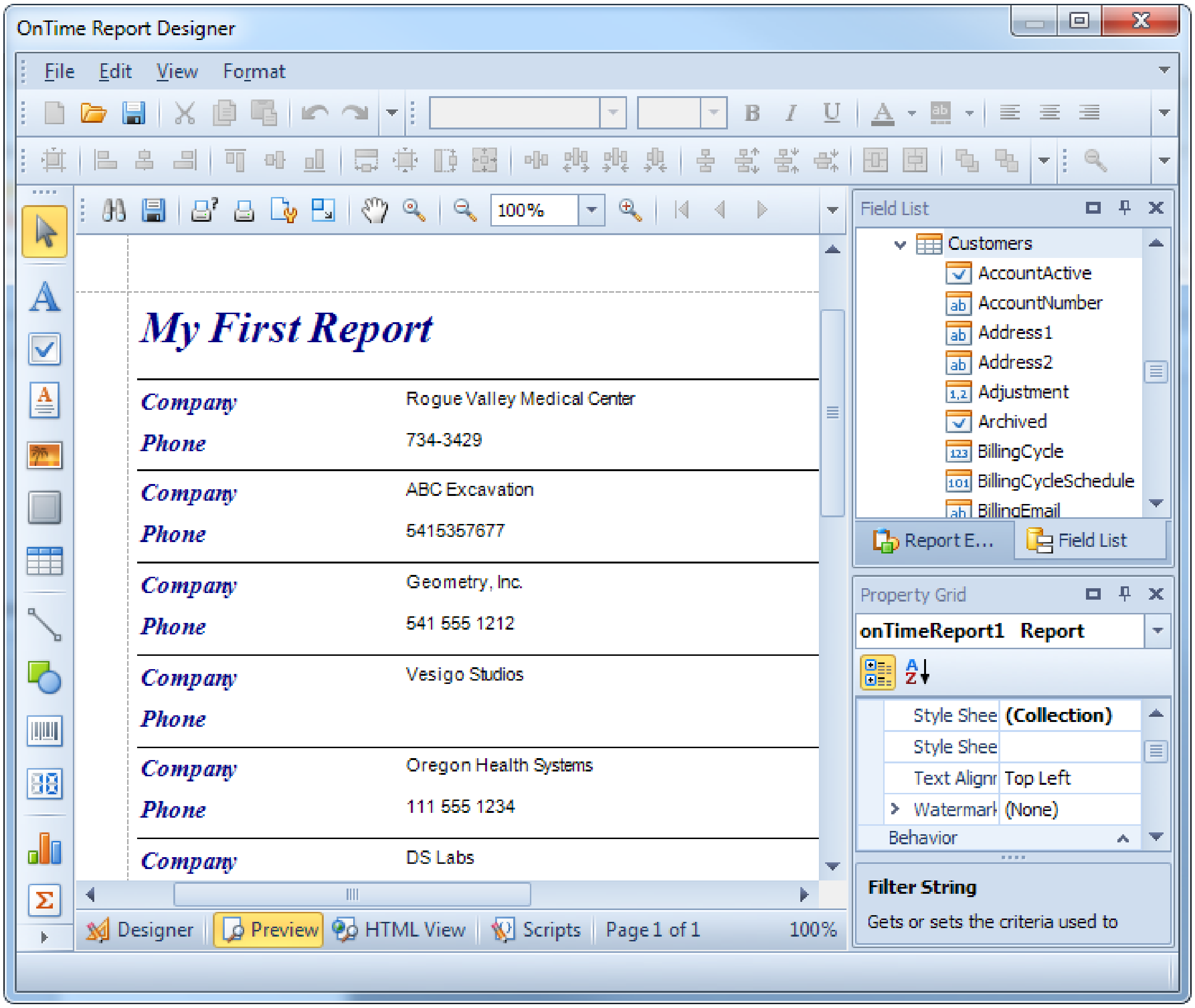
12. Choose a style to set the visual design of the report. Press **Next**.



13. Name the report. Press **Finish**.



14. The wizard will close and the report will be created.
15. Click the **Preview** button at the bottom of the report designer to view the finished report, which will show a list of all customers and their phone numbers:



Additional resources, including videos, are available on the OnTime website (http://www.ontime360.com/Support.aspx) to help with report authoring. For answers to specific questions, contact technical support.

Zones

A zone is a defined area used for price calculations, and can appear in a price set grid. Zones may be defined in whatever manner best suits a particular company's needs; however, they may correspond directly to postal code or zip code boundaries.

All locations created that contain a zip code assigned exclusively to one zone will be associated with that zone. Locations created containing a zip code assigned to multiple zones may need to be assigned by a manager or dispatcher.

Deleted zones are archived, not removed from the system. If a new zone is added with the same name as an archived zone, a prompt will appear asking to restore the archived zone. Create zones with unique names to avoid this conflict.

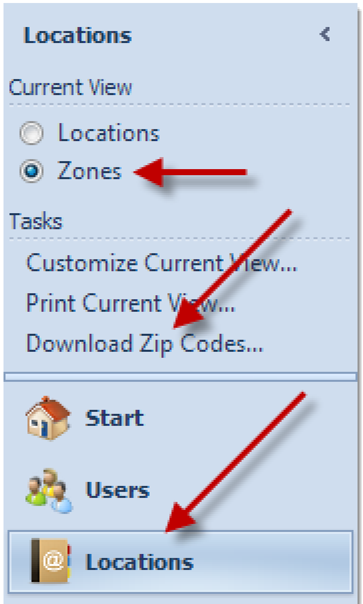
Download Hundreds of Zones and Zip Codes in Seconds

OnTime can quickly download zones from its web service.

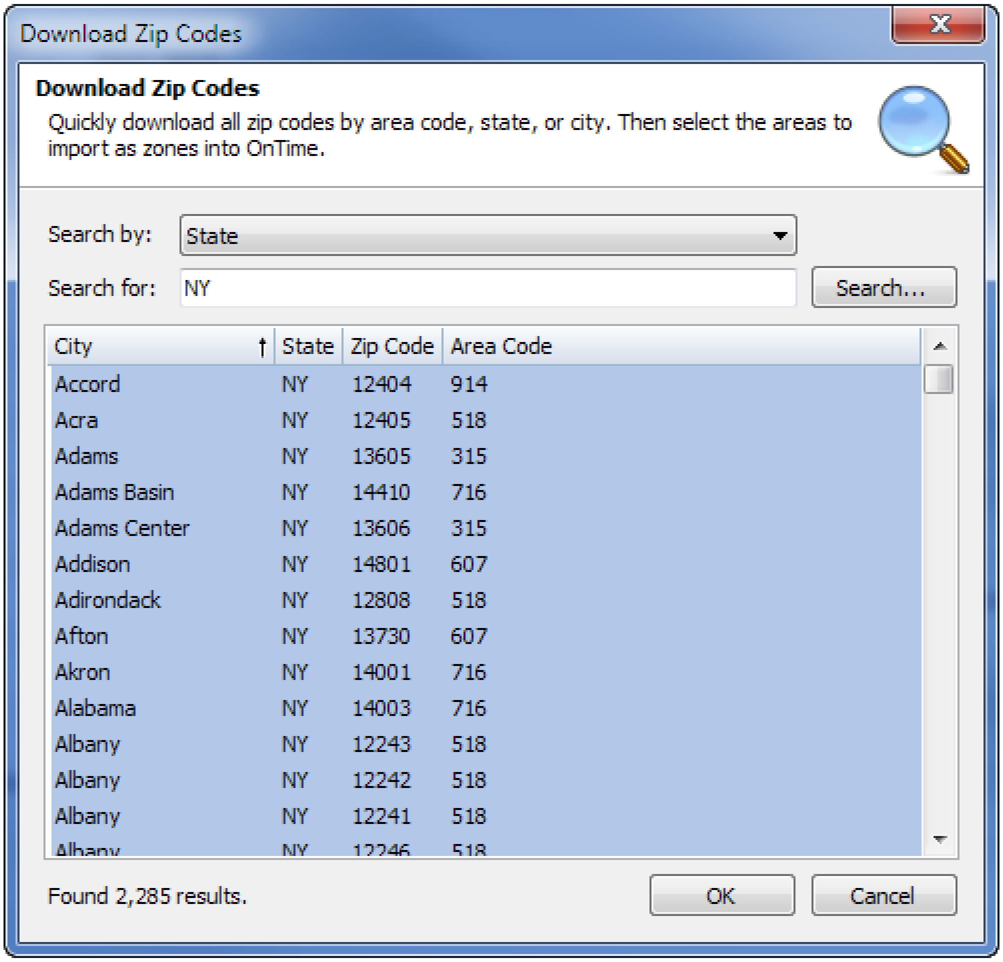
> **Note**: United States zip codes only. Free of charge to customers subscribed to Standard or higher subscription plans.

To Download Zones from OnTime

1. Go to the **Locations** area
2. Click the link labeled **Download Zip Codes**:

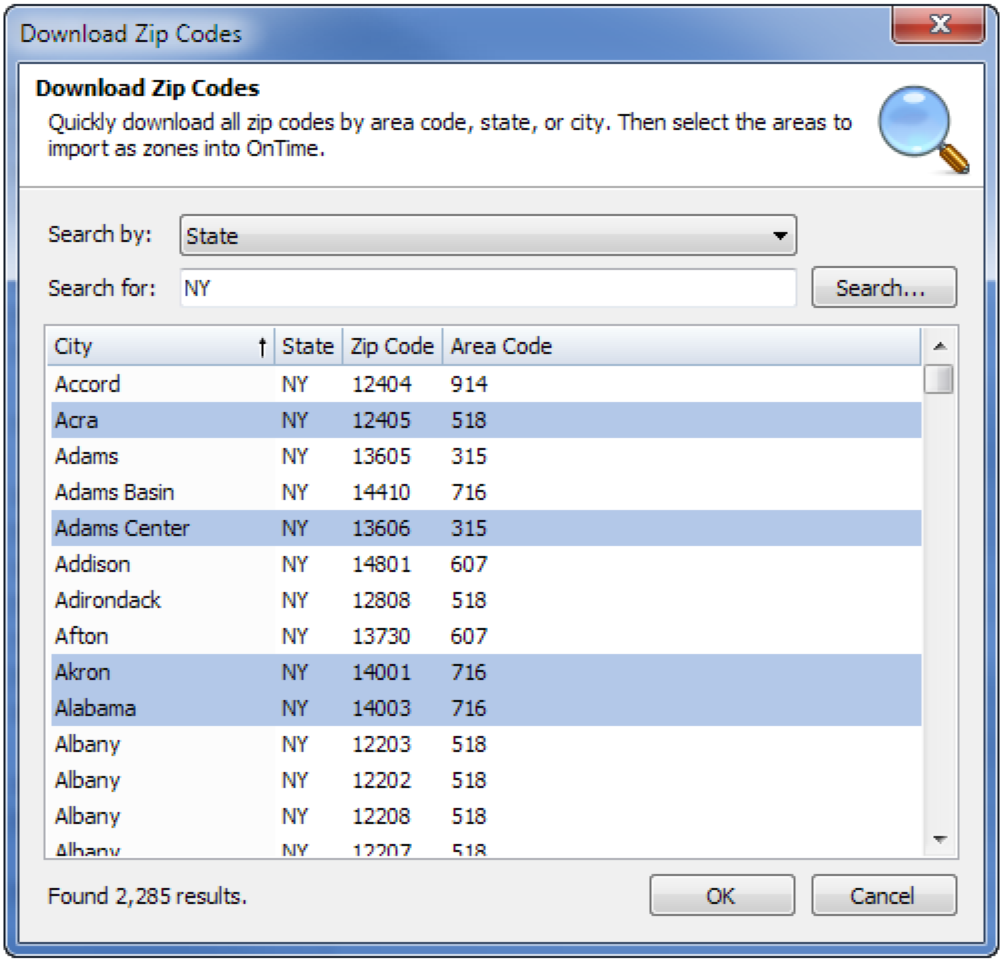


3. In the resulting window that appears, choose to search for your zip codes by **State**, **City**, or **Area Code**.
4. Type in the desired search term (for state searches, use the two letter state abbreviation)
5. Click the **Search** button
6. Once the search is completed, the results will be displayed in the list area.



An example search for all zip codes in New York

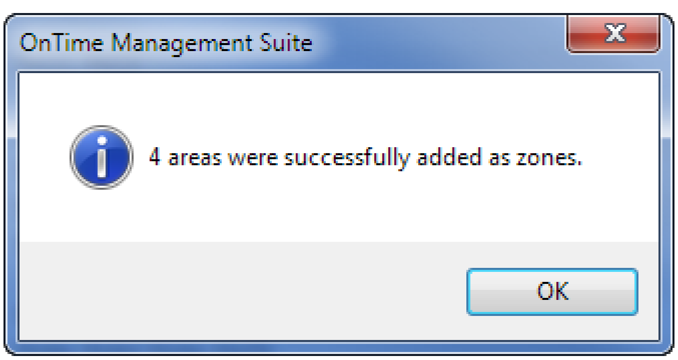
7. Click on the column headers in the list to re-sort the columns.
8. Clicking the **OK** button will import all selected items in the list as zones, using the city name as the name of the zone. Select only the items that wanted before pressing **OK**.



Only items highlighted in blue will be imported as zones.

Tip: Select several items from the list at once by holding down the control key (CTRL) while clicking the desired items.

9. After clicking **OK**, the new zones will be imported and a message will appear:



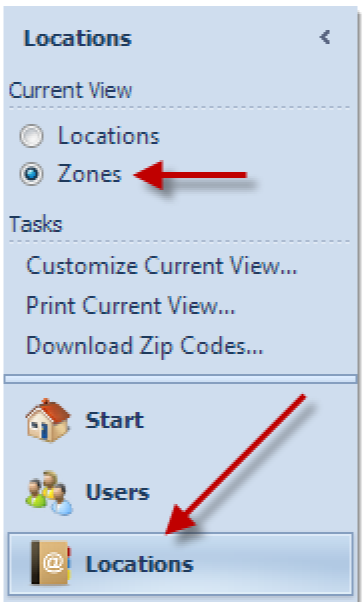
Merging Zones

One of the problems with rearranging zones is that thousands of addresses and locations may have already been tied to a zone. Manually changing those locations to another zone is time-consuming and tedious.

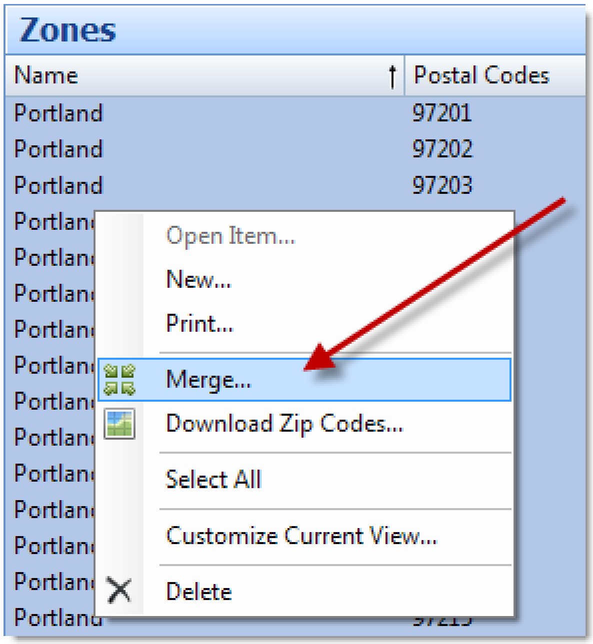
OnTime allows zones to be merged easily and automatically.

To Merge Zones

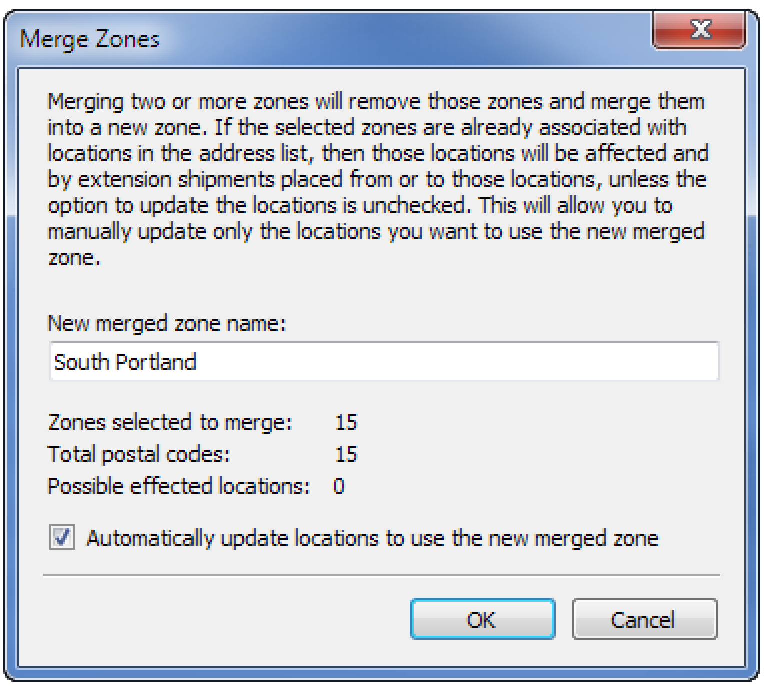
1. Click on the **Locations** area
2. Select **Zones** as the Current View:



3. Select the zones to be merged from the list
4. Right-click the selected zones
5. Choose **Merge**



6. In the resulting window, enter a name for the zone that will be created after the merge:



7. If desired, check the **Automatically update locations to use the new merged zone** box to make OnTime update all locations associated with these merged zones.
8. Click **OK**

The selected zones will be merged into a new zone and the old zones will be removed.

Time Clock Features

The built-in time tracking and auditing features in *OnTime Management Suite* help to simplify the process of gathering user activity from *OnTime Dispatch* and *OnTime Mobile*.

The system records a start time based on when a user clocks in. A timer runs until the user clocks out. The information gathered is permanently recorded by OnTime as a session with the user's name attached. . When a pay detail report is run, all sessions that fall between the selected dates selected are gathered to calculate appropriate time and wages.

If a session is spread across more than one day, the session will be split in two. The first session will *stop* at 12:00 AM and the second session will *start* at 12:00 AM.

Time clock sessions can be edited.

To Edit a User's Time Sheet:

1. Go to the **Users** area
2. Right-click on the desired user
3. Choose View Time Sheet

Choose a date range to change clock in and clock out times as well as miles driven during that session on this form.

Any users clocked into the system show an ONLINE status. These users include drivers and dispatchers clocked in using *OnTime Mobile* or *OnTime Dispatch*, respectively.

Note: Clocking in and out should not be confused with *signing in and out* of the applications. When signing into *OnTime Mobile* or *OnTime Dispatch*, the user is gaining access to the system, not necessarily clocking in. The user needs to explicitly clock in, which indicates to the system that the user is on the time clock.

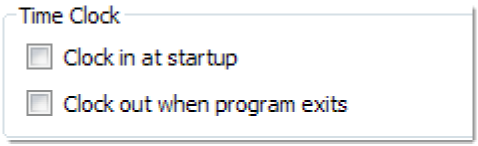
Time Clock Features in *OnTime Dispatch*

By default, *OnTime Dispatch* will automatically clock the user in and out when the program is started and closed

To Change Automatic Time Clocking

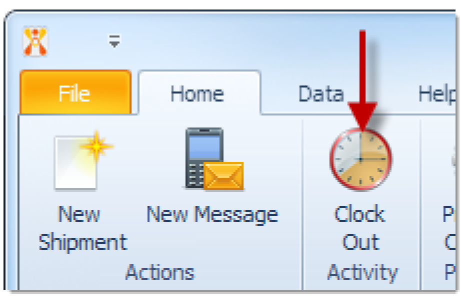
1. Click the **File** tab in the upper left-hand corner of the program
2. Choose **Option**
3. Select the **General** tab

4. Change the setting under the **Time Clock** group

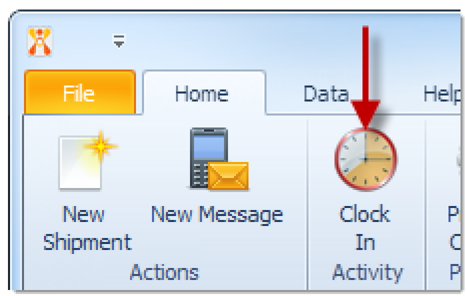


OnTime Dispatch records the time spent as a dispatcher and the number of orders entered and submitted while the user is clocked in.

The time clock button in the upper left-hand corner under the **General** tab will show whether a user is clocked in or out of *OnTime Dispatch:*



Clocked In



Clocked Out

Time Clock Features in *OnTime Mobile*

OnTime Mobile will **not** automatically clock the user in and out when the program or session is started and ended.

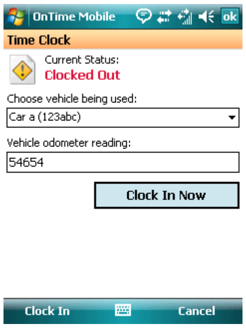
To Clock In or Out when Using OnTime Mobile for Windows Mobile

1. Go to the **Tools** menu
2. Choose Time Clock
3. Choose a **vehicle** from the list
4. Enter the current **odometer** reading for that vehicle
5. Choose clock in or clock out

To Clock In or Out when Using *OnTime Mobile WAP Edition*

1. Select the **clock in** or **clock out** link
2. Choose a **vehicle** from the list
3. Enter the current **odometer** reading for that vehicle
4. Choose clock in or clock out

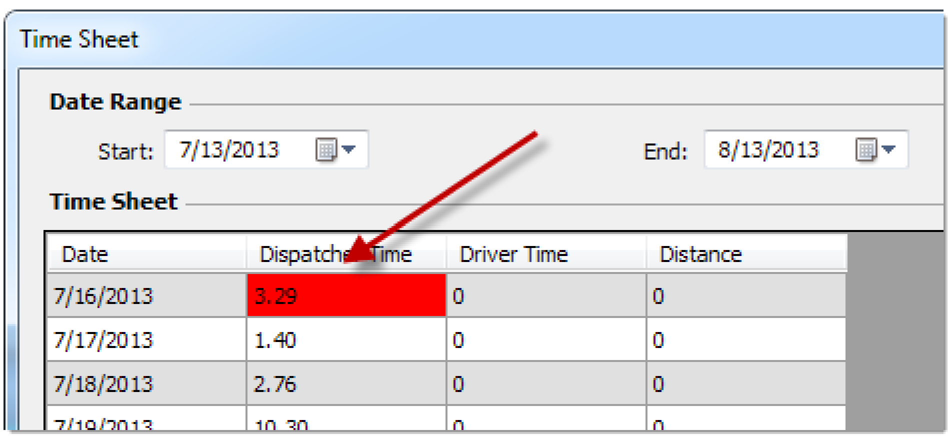
OnTime Mobile will record the time spent as a driver and the number of orders handled while the user is clocked in.



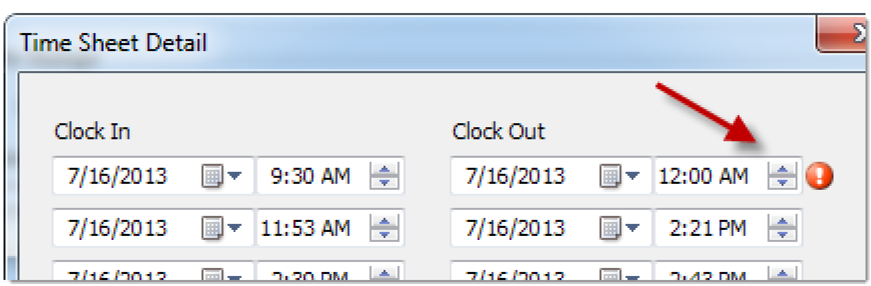
Accessing Time Clock Data

The results of the time clock data can be viewed and edited in *OnTime Management Suite***.**

- From the **Users** list, right-click a user to see his past 30 days of data by choosing **View Time Sheet**.
    - Choose a different date range and click **Calculate Time** to view more data.
    - The user's activities appear. Each day is on one line and a breakdown of activities as a driver and activities as a dispatcher is displayed.
- Potential inconsistencies in the activity or time of a user will be flagged by a red cell.



- Double-click on the cell find the problem. Resolve the conflict manually.



- Once you have evaluated workers' activity, view the compiled information in the **Time and Activity** reports.

Employees, Subcontractors, Agents, and Partners

Tips:

- Make use of the time clock features, letting OnTime track the activities of personnel, to easily determine pay later on.
- Temporary workers and agents may be given accounts to log in for as long as they are working with an organization.
- Real-time results, such as POD information for customers, can be preserved when trusted partners and agents use OnTime.

Importing Data

OnTime can import records contained in Microsoft Excel (XLS, XLSX, and XLSB) files and Comma Separated Value (CSV) files. Because these two file types are common and easy to work with, any information from an existing system can usually be converted into one of those formats. For example, QuickBooks only exports data in the Tab Separated Value (TXT) file format. To convert a QuickBooks file, open the TXT file in Microsoft Excel and save it as an XLS or CSV file.

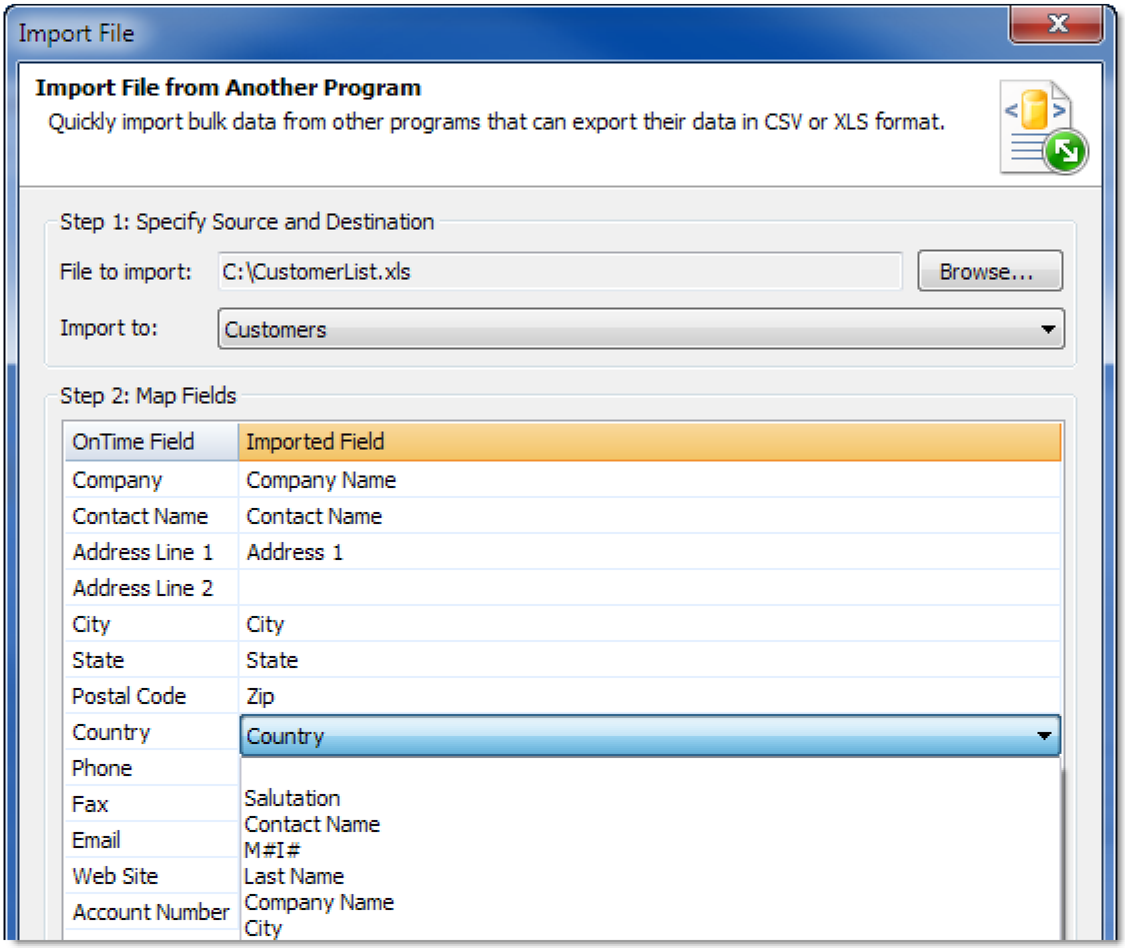
Records may be imported as the following types:

- Customers
- Locations
- Shipments
- Zones

Customers and shipments can be combined into one import.

How to Import a File to OnTime:

1. Select File > Import Data
2. Click the **Browse** button
3. Choose an Excel (XLS) or CSV file
    - If an Excel file is chosen, select the appropriate worksheet in the file
4. Select which list data should be imported to
5. Click on the **Imported Field** column list to see a drop-down menu.
6. Select the field from the resulting drop-down menu, which should correspond to the **OnTime Field**. Not all fields need to be mapped, but only mapped fields will have data imported.



7. Click the **Import Now** button

Note: If any records fail to import during the process, none of the imported records will be saved.

Note: OnTime will try to remember the mapping set up for a list.

Note: Dates and times may be imported as either UTC (or Greenwich Meantime) or your local time. If necessary, adjust dates and times before importing.

Exporting Data

Virtually all data can be exported from OnTime. Here are two ways:

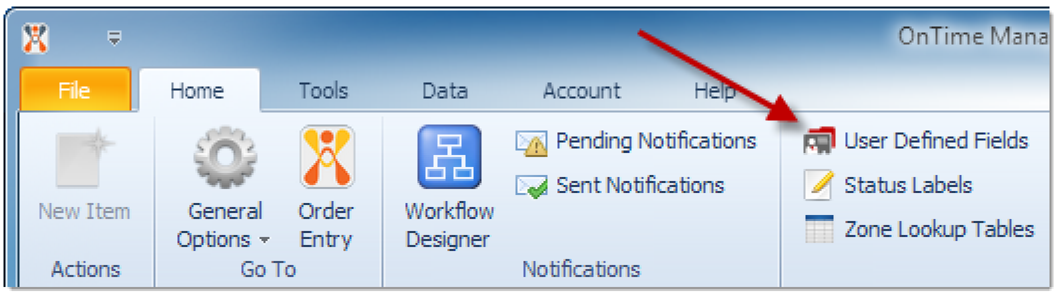
1. Within virtually every list of data in *OnTime Management Suite*, records may be exported by right-clicking the desired records and choosing **Export**. Enter a file name and save the selected records to a comma separated value (CSV) file.
2. Within virtually every list of data in *OnTime Management Suite*, records may be exported by selecting the desired records and pressing CTRL + C (or right-clicking and choose **Copy**). The records may then be pasted into a compatible spreadsheet program such as Microsoft Excel.

User Defined Fields

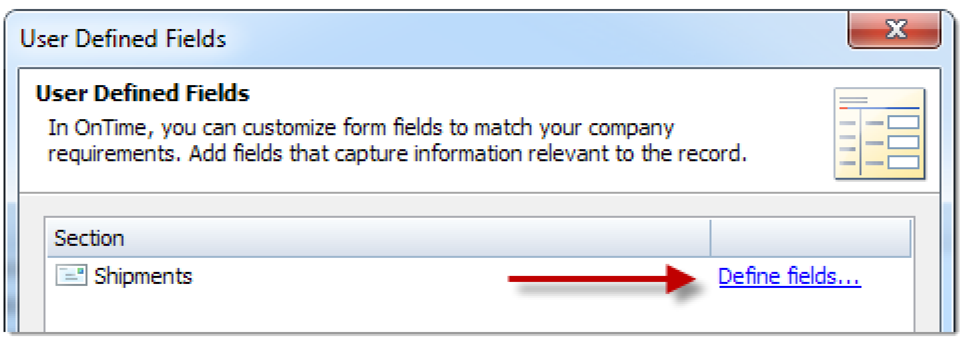
OnTime allows for up to 50 different types of custom fields (text, date, number, and check box fields).

To Setup the User Defined Field List

1. Click on **User Defined Fields** under the **Home** tab in the ribbon:

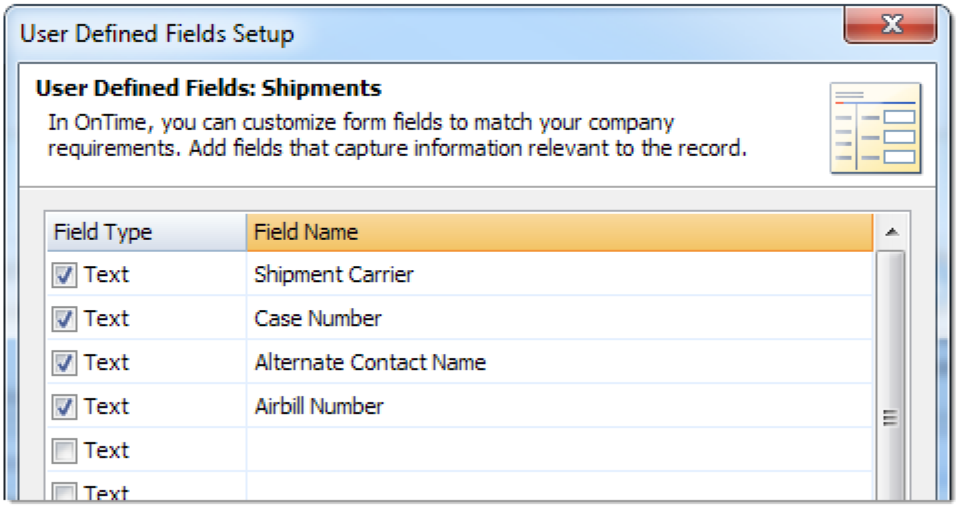


2. Click on the **Define fields...** link for shipments:

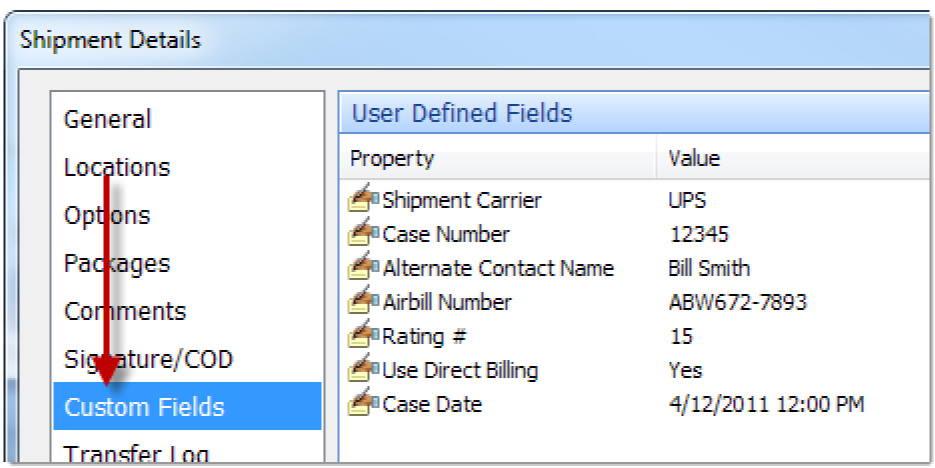


3. Check the box next to a field to activate that field

4. Double-click a cell in the **field name** column to specify a name for the field:



Once setup, custom are available throughout OnTime. In *OnTime Dispatch*, dispatchers will see these fields under the **Additional Details** view. Customers will see the fields listed on the order entry form in the *OnTime Customer Web Portal*. Custom fields can be accessed and modified at any time from within the tracking view in either *OnTime Dispatch* or *OnTime Management Suite*. Open an order and select the **Custom Fields** section to view or change custom fields:



Workflow Designer

Automated notifications that are sent to dispatchers, drivers, customers, and others can be customized within OnTime. These notifications may contain a variety of information and can be sent out via different methods. Notifications are configured within the OnTime **Workflow Designer**.

Email and SMS Notifications

Customized messages can be sent via email and SMS text message through the OnTime Workflow Designer. For directions on how this is done, see *Step 5: Setup Notifications* under *Chapter 3: Setting Up an OnTime Account*.

Webhook (HTTP POST)

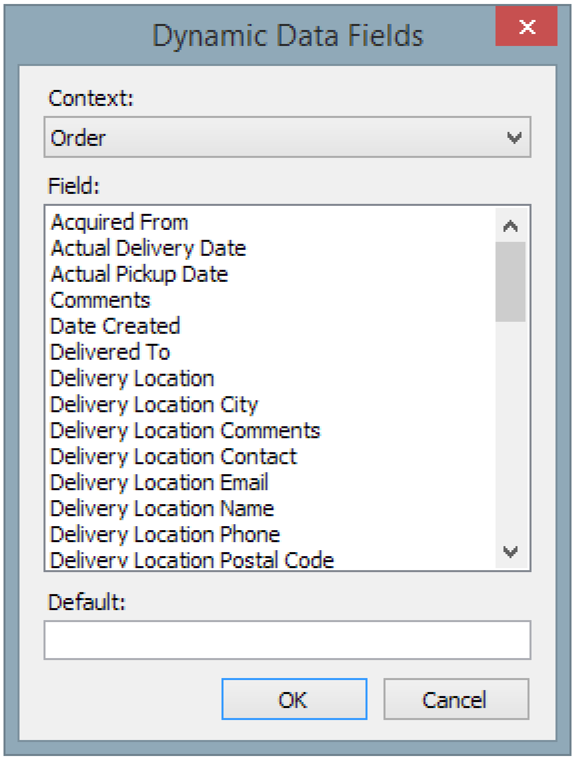
An HTTP POST, or Webhook, is an easy way to receive push notifications. A webhook is like an API endpoint but inverted; instead of making a call to the OnTime API, you define a callback URL to which OnTime will HTTP POST information as events in the OnTime Workflow happen. Your callback URL can then execute code based on the POSTs. You can think of it as defining an API endpoint for your app that will receive output from OnTime.

The OnTime Workflow Designer makes it possible to setup Webhooks that are automatically posted with dynamic information whenever the subscribed event occurs. This is accomplished by including dynamic data in the query string of the URL as it is posted.

Webhooks are widely compatible with virtually any programming language, web site, or software system.

Create a Webhook

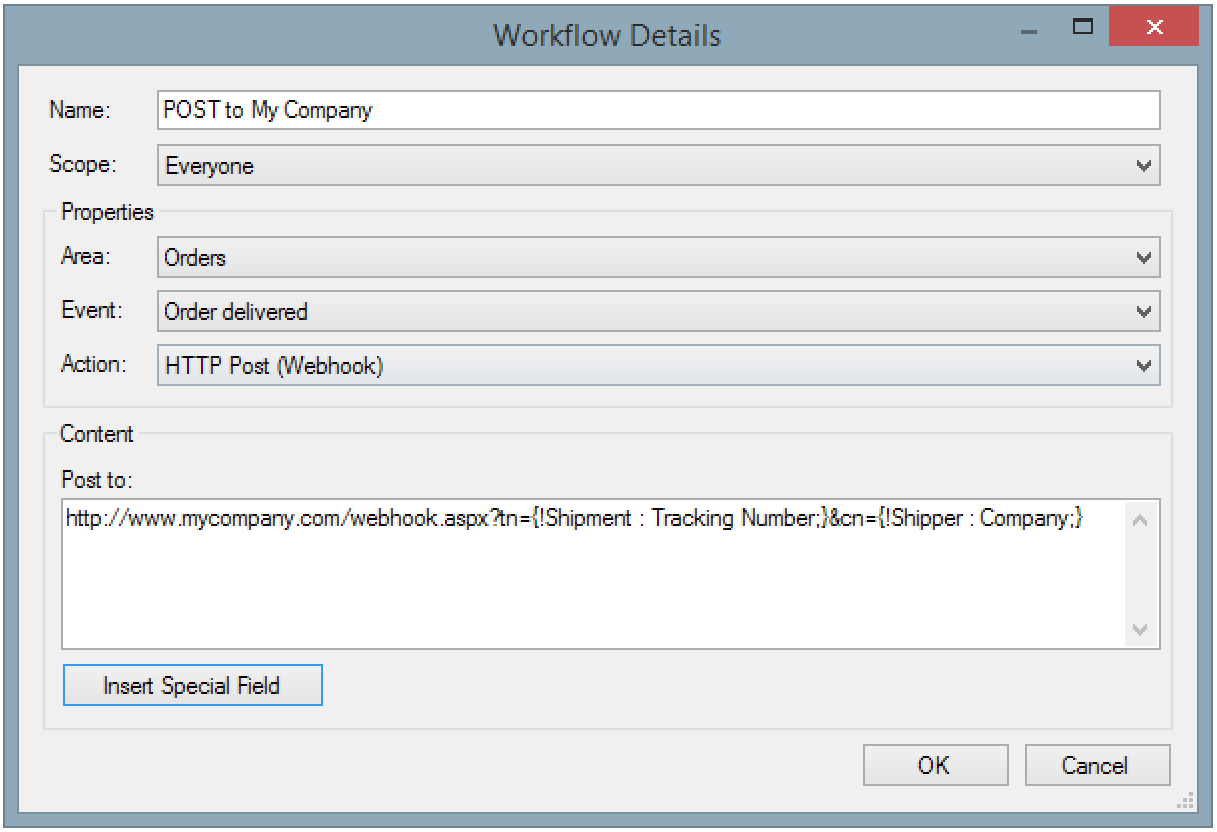
1. Go to the **Home** tab on the ribbon and choose **Workflow Designer**.
2. Click on the **New** button.
3. Give the Webhook a **name**.
4. Choose the desired **event** to trigger the Webhook.
5. Choose **HTTP POST (Webhook)** from the **Action** list.
6. Enter the URL you want to POST to in the **Content** > **Post to** box.
7. **Special fields** may be entered to specify dynamic content within a notification. **Special fields** are enclosed inside of curly braces "{ }". They may be entered in by hand; however, OnTime will automatically enter the fields when the button labeled **Insert Special Field** is clicked. You will receive a dialog that looks like this:



8. Choose the field that contains the information to be inserted into the query string of the URL.

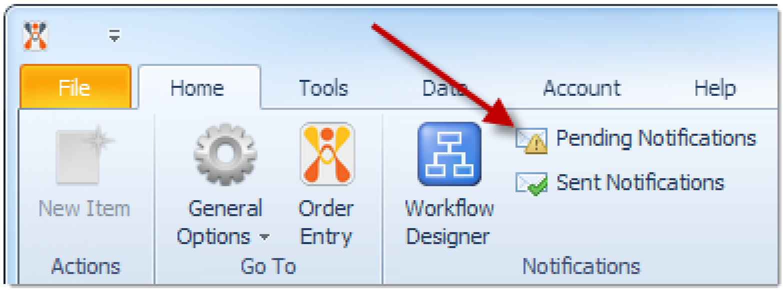
Webhook Example

The following image shows a Webhook that will trigger whenever an order is delivered. It will POST to the URL of http://www.mycompany.com/webhook.aspx. The query string includes two parameters: “tn” and “cn”. “Tn”’s value will be the tracking number of the order and “cn”’s value will be the company name of the shipper, or customer.



Checking the Status of Webhook POSTs

Any and all issues with HTTP POSTs are listed under **Pending Notifications**, available under the **Home** tab of the ribbon:



This window will show any problems with Webhooks including:

- The order involved
- The number of times the Webhook attempted to post
- The error encountered when posting
- The workflow action (or Webhook) involved

By default, OnTime will immediately attempt to post the Webhook 10 times; if these attempts are unsuccessful, the URL will be attempted once an hour.

Once the error is corrected, forcibly repost all the Webhooks in the queue by clicking the **Process All Messages Now** button. To remove a Webhook from the queue and ensure that posting attempts are no longer made, right-click the desired Webhook(s) and choose **Remove Item**.

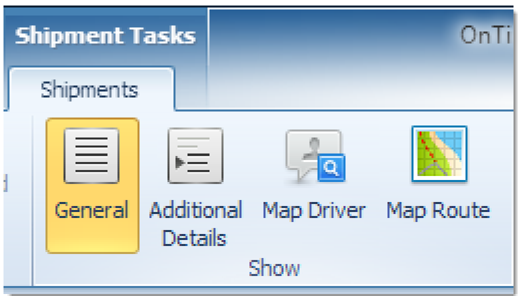
To view the results of a successful Webhook post, open the **Sent Notifications** window located under the **Home** tab. Locate the post in the list and double click it to view details. This will show the URL that was posted to as well as the final query string that was submitted.

Chapter 5: OnTime Dispatch

OnTime Dispatch provides the tools and features that dispatchers need to fulfill assignments such as entering orders, messaging drivers, and managing orders.

Orders

When entering new orders, there are four different views available: **General**, **Additional Details**, **Map Driver**, and **Map Route**.



The following sections list details about some of the fields contained in these views.

General

Customer: The name of the customer who is placing the order

Requested by: The name of the person who is requesting the order

Collection Location: The location for an order's pickup can be assigned in two ways. The first method is to search for a specific destination in the **Find a Contact** pane and drag that address to the **Collection Location** box. The second method is to pick a destination from the **Recent** box located under **Collection Location**. This section also contains two date/time boxes to set a window for the arrival time.

Delivery Location: The location for an order's drop off can also be assigned in two ways. The first method is to search for a specific destination in the **Find a Contact** pane and drag that destination to the **Delivery Location** box. The second method is to pick a destination from the **Recent** box located under **Delivery Location**. This section also contains two date/time boxes to set a window for the arrival time.

Description: A statement outlining the order. The description entered will be publicly viewable.

Quantity: This field designates the number of items the order contains.

Weight: The weight of the order in pounds (lbs.)

Distance: The distance from the **Collection Location** to the **Delivery Location**. This number is calculated automatically.

Vehicle Required: Allows a dispatcher to specify a special vehicle when required

Assigned to: The name of the driver who is assigned to pick up the shipment

Service Level: A combination of the price set and price modifiers that will be used with the order. Certain modifiers will be listed under **Standard Options.**

Standard Options: A list based on the modifiers in the **Service Level** selected. Select a modifier by filling the box beside its name.

Base Price

Zone based: Calculates the base price using the set zone-to-zone values. Additional instructions from the company may appear directly under the price set selection box (if programmed in).

Distance based: Calculates the base price using the distance of the order. For this price to be calculated, a distance base price modifier must be associated with the price set.

Flat rate: This field is for charging a flat rate that becomes the base price for the order.

Misc. adjustment: This field is for making miscellaneous price adjustments to the order.

Additional Details

Date submitted: Specifies the date of the order; may be used to pre-date orders.

Declared value: An amount representing the customer's declared value of the shipment.

Incoming tracking number: An alphanumeric string up to 50 characters long. This field is usually filled with a tracking number or bar code that the originating shipper provides for tracking purposes.

Outgoing tracking number: An alphanumeric string up to 50 characters long. This field is usually filled with a tracking number or bar code that the receiving shipper provides for tracking purposes.

Collect on delivery: The **Collect on delivery** (COD) option indicates to the driver that funds for the order should be collected at either the collection or delivery locations.

Collect at: This option specifies whether the COD should be collected on delivery or pickup.

Amount to collect: This specifies the cost for the COD to be picked up.

Comments: Additional notes or comments regarding the order. These are kept private and not shown to the customer.

Map Driver

The Map Driver feature shows the last known location of the driver on a street map. In order for this feature to work, a specific driver must be selected for the order via the **Assigned To** field.

Map Route

The Map Route feature shows a detailed map of the route for the selected order and calculates the mileage for the order.

Order Entry through *OnTime Dispatch*

Features and tips for using the order entry functions:

- Create a new shipment by clicking the **New Order** button in the upper left.
- The tabbed interface allows multiple orders to be open at once, which is very useful when certain order entry needs to be put on hold temporarily.
- Most fields have auto completion built in: appropriate entries will be suggested when typing.
- The **Recent** drop-down boxes show the previous 10 locations that were either shipped from or to.
- The **Directory** drop-down box may be used to search for any address in the system by company name.
- The **Find a Contact** pane offers a more advanced search. Drag and drop a selected customer or address onto the order entry form to quickly populate the contact information.
- Locations that are not already in the address book can be added by clicking the **New Location** button or the plus sign (+) in the appropriate lookup box.
- In the **Assigned To** box, assign a driver by typing or choosing one from the list. OnTime will suggest an appropriate driver when the ellipsis button in the **Assigned To** box is pressed.
- View the selected driver's last known location on a map by clicking the **Map Driver** button.
- Once a customer, pickup location, and delivery location have been populated, pricing will become active.
- Select the **Service Level**, which may change the available **Standard Options** and delivery arrival window.
- Select the method for arriving at the **Base Price** for the shipment.
- Fill in remaining fields. The price will change in real-time as adjustments are made.
- If the selected customer is given a rate adjustment , the prices will reflect that percentage. The **Total Cost** will reflect the percentage increased or discounted. This adjustment rate *only* applies to predefined pricing. The amount entered into the **Flat Rate** base price field or the **Misc. Adjustment** field is not affected by this adjustment.
- Additional order options can be accessed by clicking on the **Additional Details** button.
- To manually set the submission time of an order, make adjustments in the **Date Submitted** box.
- Items in a shipment can be listed individually by adding them to the **Item Details** list. Note that this will also change the total weight and volume of the shipment.
- View the suggested route for the selected shipment by clicking on the **Map Route** button.

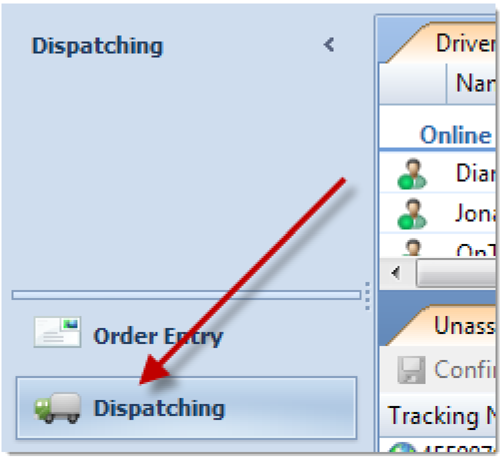
- The **Map Route** view will assist with judging distance, which can help to determine price. Turn-by-turn directions may be copied to the comments section of the order. This section can be made available to drivers if they need assistance to locate either a pickup or delivery location.
- Click the **Submit Order** button to enter the order into the system, where it will then be processed. Click the **Submit All Open Orders** button to quickly submit all open orders simultaneously.
- Click the **Submit Completed** button to place the order into the system with a completed status. This option is especially useful when entering orders that were processed outside of OnTime at an earlier time.
- Click the **Place on Hold** button to freeze the order. The screen will clear and an entry will appear on the left. This order can be accessed at any point in the future to resume, edit, and/or submit. This feature can also be used to create order templates for use when expecting several similar orders from a particular customer.
- If desired, a cut off time of day may be specified. This option will automatically set the due date of orders to the next day. In *OnTime Management Suite*, go to **General Options** to edit the cut off time.

Unassigned Shipments

- Clicking on the **Dispatching** area of *OnTime Dispatch* will show a list of all available drivers and a list of all orders that have not been assigned to a driver.
- Double clicking on a driver will display information about that driver and a list of his or her current assignments.
- Orders can be assigned to drivers by dragging the name of the driver on top of the order.
- Once a driver has been assigned, click the **Confirm All Changes** button to submit the changes to the server or click **Cancel All Changes** to undo the assignments.
- Be sure to synchronize with the OnTime server to ensure all data is transferred.

Dispatching Options

The system is able to monitor driver activity, location, synchronization, assignments, and more in the dispatching area:



The dispatching area contains three tabs:

- Driver List
- Driver Positions
- Unassigned Shipments

Driver List

This section lists all users that are assigned the driver role in *OnTime Management Suite*.

A green circle next to a driver's name indicates that the driver is clocked in. A grey circle next to a driver's name indicates that the driver is clocked out.

Last Known Location shows the last order drop off the driver had completed.

Last Sync displays when the driver has synced all orders with the *OnTime Mobile* software.

Double-clicking a name will pop up a dialog that will show more information regarding the driver such as Name, Email, SMS Address, Assignments, and mobile phone number. Right-clicking a driver brings up a menu with options for sending messages to that driver by SMS or by email.

Driver Positions

This section displays a map with the last known location of all drivers. Locations are updated every 60 to 90 seconds. Hover the cursor over a pin on the map to display the associated driver's name.

Unassigned Orders

This section lists all unassigned orders that have been created in *OnTime Dispatch*. These orders can be assigned by dragging a driver’s name from the **Driver List** onto the specific order in the **Unassigned Orders** section. These assignments must be committed by clicking the **Confirm All Changes** button. More details can be found by double-clicking on an order. Drivers may be given the ability to assign unassigned shipments to themselves with the *OnTime Mobile* software.

Messages

The OnTime messaging feature allows messages to be sent to drivers in the field on their mobile devices. These messages are viewed using the *OnTime Mobile* application. With this feature, drivers can be warned of weathers conditions and construction sites, or notified of special information regarding pickups and deliveries.

To Send a Message

1. Click **New Message**.
2. Choose the desired method to send the message. Choices include SMS text message, email, or through *OnTime Mobile* as a general message.
3. Select a driver to send the message to from the drop down list.
4. Enter the message to be sent.
5. Click **Send**.

Messages to Drivers

- Communicate with drivers by sending messages through OnTime.
- A new message may be sent out to a single driver or to everyone.
- After sending, it's possible to see if and when a driver has read a message. There will be a check mark under the read by recipient column if the message has been read.

Be sure to synchronize with the OnTime server to ensure that message information is up to date.

Program Options

This window offers access *OnTime Dispatch* setting changes.

General

This section allows changes to be made to general settings throughout all areas of the program.

Close driver message after sending: This option closes driver messages after they have been sent to a driver in the **Messages** area of the program.

Only show drivers that are clocked in: When checked, drivers that are not currently clocked in will be filtered out of some lists.

The **time clock** is essential for tracking hours that the dispatcher has spent using the dispatch program. If these options are not checked, dispatchers must click the clock in/clock out option on the ribbon in the general tab for their time to be logged.

Clock in at startup: If this option is checked, the user signing into Dispatch will automatically clock in on sign in.

Clock out when program exits: If this option is checked, the user signed into Dispatch will be clocked out once the program is exited.

Always use last pickup location on new orders: When checked, new orders in the order entry screen will automatically load the last pickup location used on a submitted order for the specified customer.

Always use last delivery location on new orders: When checked, new orders in the order entry screen will automatically load the last delivery location used on a submitted order for the specified customer.

The option to **play sounds** determines if sound effects should be played on the computer when certain events occur, such as new orders coming in. Uncheck the box to silence these sound effects. If you wish to use your own sound effects, click the link labeled **play custom sound when new items arrive**. Sound effects can be selected if they are in the WAV audio file format. Return to the default sound effects at any time by clicking the link labeled **use default sound**.

The user interface of the program can be adjusted to use different **color schemes**. The available color schemes are blue, silver and black.

Customized user interfaces are preserved when any OnTime application is closed and restored when the application starts up. If there is a need to reset the user interface to its default settings, click the link labeled **reset primary user interface layout**.

Startup

This section changes options for actions that occur when the program is started.

Check for program updates: When this option is selected, OnTime will check for any available updates and display a prompt if one is found.

Automatically sign in: When enabled, this option will automatically log in with same company ID, user name, and password that were last used to sign in. Uncheck this option to have the OnTime pause at the sign in screen to enter different credentials. We recommend not checking this option when using a public computer.

Mapping

This section contains options to change the preferences of the mapping feature.

Distance unit: Which units the distance will be measured in when displaying the map. Valid choices are miles and kilometers.

Route type: The type of route can be *shortest*, *fastest*, or *preferred roads*. This preference will determine default routes.

Tracking

Maximum number of rows to display defines the maximum number of rows that will be displayed at one time in the tracking view. This function helps to improve performance because only the most recent results are loaded. We recommend lowering this number to a comfortable minimum to improve the performance of searching.

Color Coding

This section contains settings which relate to the tracking view. Three colors can be defined which correspond to time spans in relation to deadlines.

Orders past the pick up time will change the color of an order's row when the time is later than the window for picking up the order allows.

Orders past the delivery due date will change the color of an order's row when the time is later than the window for delivering the order allows.

Orders within *XX* hours of the due date is a custom field which will change the color of an order's row when the time gets to be within the number of specified hours of the latest time in the window for delivering the order.

Synchronization

To allow OnTime the unique ability to work in both an online and offline state, data added and changed on one computer is synchronized with all computers running OnTime within the organization. This section provides options regarding how synchronization works on a particular computer.

- How do you want to keep this computer in sync with OnTime
    - **Automatically**: Any changes made will be automatically sent to everyone.
    - **Let me manually control when synchronization occurs**: This option causes a synchronization button to appear in the ribbon, allowing manual control over when synchronization with the OnTime service occurs.
- Optimize synchronization with the server for
    - **Slow Internet connections**: Select this option for slower or unstable internet connections. Information is transmitted is smaller chucks to improve reliability, but can slow down synchronization.
    - **Fast Internet connections**: Select this option for faster and stable internet connections, such as DSL or cable. Information is moved in larger chucks, which improves the speed of synchronization.
- If you and another user change the same record at the same time and there is a conflict
    - In a system such as OnTime, two or more people could edit the same record of data at the same time. While OnTime usually automatically resolves this conflict, sometimes a decision needs to be made regarding whose version of the data should be used. Users may use three options to determine when OnTime automatically assesses conflict and when the program prompts the user to decide a course of action:
        - **Ask me in each case**: A dialog box showing the two versions of data will appear every time that a conflict occurs. Select this option to stop OnTime from automatically resolving these conflicts.
        - **Always use the changes on the server**: If a conflict occurs, the changes made by others will always take precedence. Your changes will be overwritten.

Resources

This section contains information about the program and other resources, such as links to web sites.

Chapter 6: OnTime Customer Web Portal

Note: The *OnTime Customer Web Portal* is only available to Enterprise level or higher subscribers.

The *OnTime Customer Web Portal* (CWP) offers a real-time view of a customer's orders. Here are some highlights:

- For quick access, the CWP can be viewed inside of *OnTime Management Suite*
  - The location should already be set and can be viewed under **Tools** > **Connections**
- Customer can log in using either their email address or account number and password
- Orders can be self-dispatched by clicking on the **Dispatch** link
  - This interface is very similar to *OnTime Dispatch*
  - **Pickup** and **Delivery** locations include a history of addresses previously delivered to, as well as the option to add new addresses
  - Any address can be edited from the **Address Book** link later
  - The desired service level and preferred pickup and delivery times can be selected in the service section
  - The current time zone is indicated
  - Customer can choose the options desired for the shipment
  - Required options will appear grayed out and cannot be unchecked
  - Dispatching the shipment will take customers to their tracking view where they can then see the live status and print out shipping labels if required
- The addresses that appear in a customer's address book are designated by how that customer and those locations are linked. From either the customers or locations list, right click on a record and choose to link one to the other.

Customizing the OnTime Customer Web Portal

The *OnTime Customer Web Portal* is a web application that can be linked to any company's existing web site. This website offers customers access to tracking, self-dispatching, address book, and other features directly from a company's web site. The *Customer Web Portal* comes with a generic default theme. The theme may be customized to match an existing web site.

Change the Layout

The layout refers to the position of elements in a web page. Changing the layout refers to moving those elements or blocks to another location on the web page.

The *OnTime Customer Web Portal* makes use of ASP.NET Master Pages; thus, all features of that technology can be employed in customizing the site. More information on ASP.NET Master Pages can be found at the Microsoft web site. Making changes to the master page allows the layout of elements to be changed on every web page in the site.

The master page files are located in Theme folder, which is located in the *OnTime Customer Web Portal* site. The file that should be edited is named **MasterPage.master**. Because making changes to the master page file can cause problems if the changes are done incorrectly, we recommend making a backup copy of the file before editing it.

Those who are subscribed to OnTime 360 will never have the contents of the Theme folder altered without notification first.

Change the Style

The style refers to the visual elements of the web page such as font, size, and color. Changing the style refers to altering those fonts, sizes, and colors to match the graphical needs of a design.

The OnTime Customer Web Portal makes use of industry standard CSS style sheets. Making changes to the CSS files will allow the appearance of elements to be changed on every web page in the site.

The CSS files are located in Theme folder, which is located in the OnTime Customer Web Portal site. The primary file that should be edited is named **baseStyle.css**. Because making changes to the CSS file can cause problems if the changes are done incorrectly, we recommend making a backup copy of the file before editing it.

Those who are subscribed to OnTime 360 will never have the contents of the Theme folder altered without notification first.

Making Changes to the Master Page and CSS Files

Changes are made to the layout (MasterPage.master) and style (baseStyle.css) files from within *OnTime Management Suite*:

1. Click **General Options** from under the **Home** tab.
2. Click **Customer Web Portal**.
3. Under the **Appearance** section, ensure that **Advanced Customization** is selected.
4. Click the link labeled **Edit Master Page and CSS**.
5. The current state of both files will appear under tabs labeled **Master Page** and **CSS** at the top of the window. Make changes to the files as needed or choose **Reset to Default** to recover the files back to their original, default state.
6. Click **OK** to save the changes. Note: Due to caching, some changes may take a few minutes to resolve.

Chapter 7: OnTime Mobile

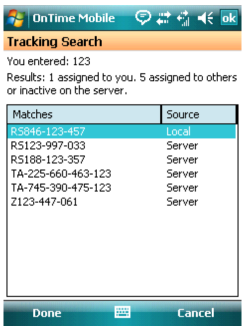
OnTime offers the option to use the mobile hardware desired. With *OnTime Mobile*, virtually any mobile device with internet access can make use of OnTime's features.

Using OnTime Mobile WAP Edition

- To use *OnTime Mobile WAP Edition* a mobile device which is either WAP enabled or has a web browser with access to the internet is required.
- Access *OnTime Mobile WAP Edition* by navigating to the URL supplied by Vesigo Studios on the mobile device.
- Log in using the appropriate **user name** and **password**.
- Basic features such as working with shipments and receiving messages from dispatchers are accessible after log in.
- Because mobile devices' WAP interfaces vary, *OnTime Mobile WAP Edition* will generally appear differently on different devices.

Using OnTime Mobile for Windows Mobile

- Windows Mobile 2003 or later devices have enhanced functionality with many more features available.
- A built in database stores all information locally on the device allowing work to be done whether or not an internet connection is available, a common scenario when using cellular networks.
- Windows Mobile devices with touch screens can be used for capturing digital signatures.
- Barcode scanning devices can be used to automate the scanning of shipments.
- **Assignments** and **route stops** contains a list of all orders assigned to the driver.

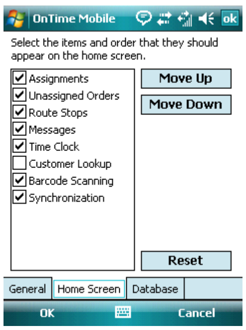


- Appropriate options for the driver are available from the **Menu** at the bottom of the list.
- Orders that require a signature or COD will automatically alert drivers when they pick up or deliver.
- **Messages** will display a list of messages sent by a dispatcher to the driver. The driver can respond by choosing the **Reply** option.
- Choosing **Synchronize** will prompt data from the device to be sent to the server and all new data will be sent to the device.
- **Run a scan** allows barcode features to be entered manually or with a barcode scanner attached to the device.
- Select **Key in** to manually enter part of a tracking number in. Choose **Done** to search both locally assigned shipments and others that are on the server. Pick a shipment from the list and then click **Done** to access the shipment's options.
- If appropriate, the option to **log check point** will be available. This option allows a **location** and **notes** to be entered. This information can be viewed by dispatchers in the tracking view.
- Connection status and options for reconnecting after being offline can be viewed from the **Tools** menu under **Connection Status**.

The Home Screen View in OnTime Mobile for Windows Mobile

The home screen in *OnTime Mobile for Windows Mobile* can be customized to show only desired items in the desired order:

1. In *OnTime Mobile for Windows Mobile*, go to the **Tools** menu, select **Options**, and then the **Home Screen** tab.
2. Check items to appear and uncheck items to hide.
3. Select an item and then tap the **Move Up** or **Move Down** button to change the order in which the items appear.



4. Press **OK** to save the settings.

Time Clock Features in *OnTime Mobile*

OnTime Mobile will **not** automatically clock the user in and out when the program or session is started and ended.

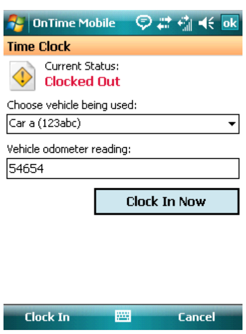
To Clock In or Out when Using OnTime Mobile for Windows Mobile

1. Go to the **Tools** menu
2. Choose Time Clock
3. Choose a **vehicle** from the list
4. Enter the current **odometer** reading for that vehicle
5. Choose clock in or clock out

To Clock In or Out when Using *OnTime Mobile WAP Edition*

1. Select the **clock in** or **clock out** link
2. Choose a **vehicle** from the list
3. Enter the current **odometer** reading for that vehicle
4. Choose clock in or clock out

OnTime Mobile will record the time spent as a driver and the number of orders handled while the user is clocked in.

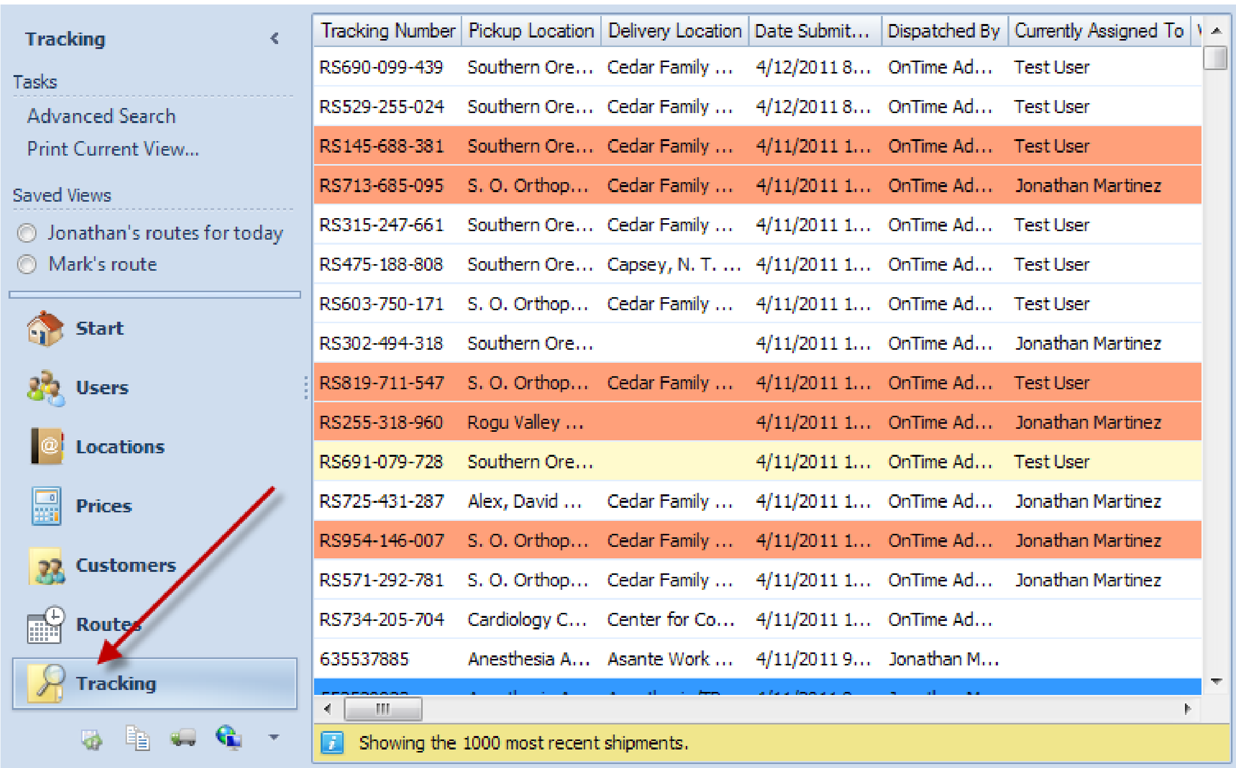


Chapter 8: Become Familiar with OnTime's Advanced Features

As explored thus far in this guide, OnTime software is equipped with a multitude of useful features. This chapter more thoroughly explores some of the more advanced aspects of our programs.

Tracking and Modifying Orders

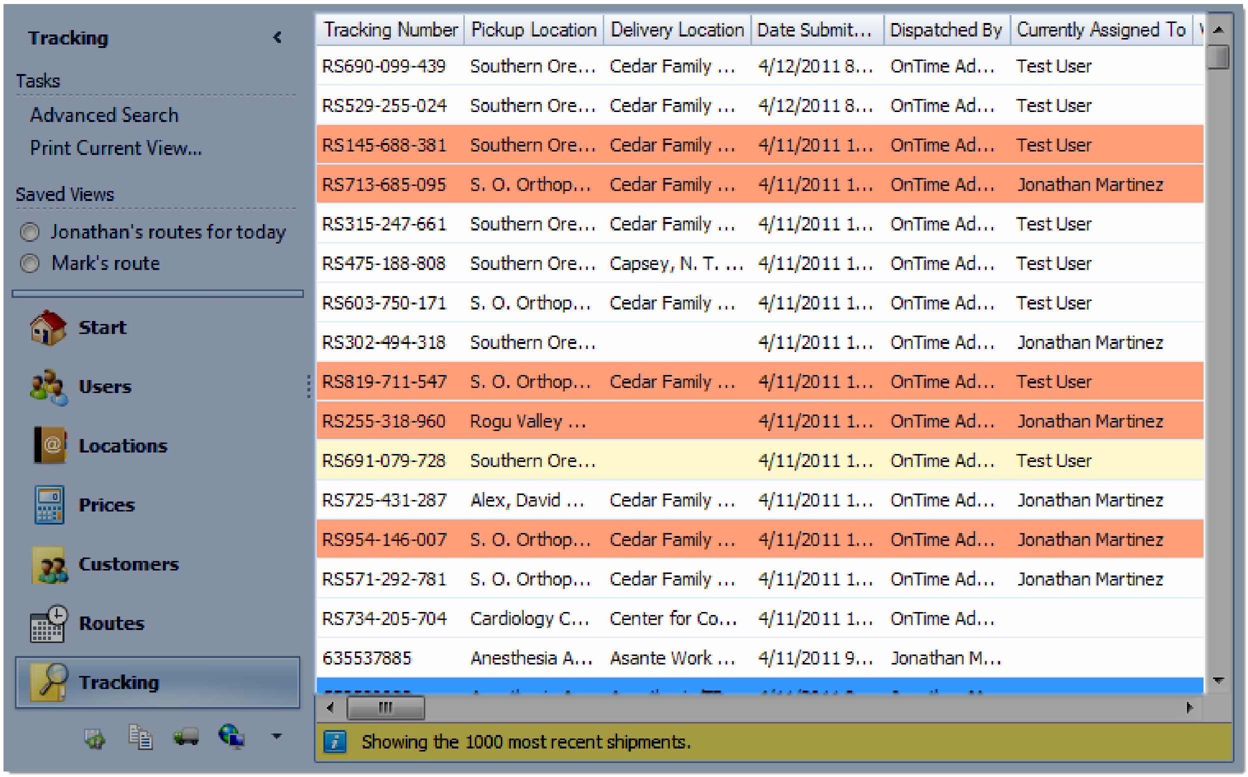
OnTime Management Suite and *OnTime Dispatch* can both access the same tracking information, allowing users to view the status of any shipment, active or inactive. This accessibility also allows certain properties of a shipment to be edited. For example, changing address information and accessorial items.



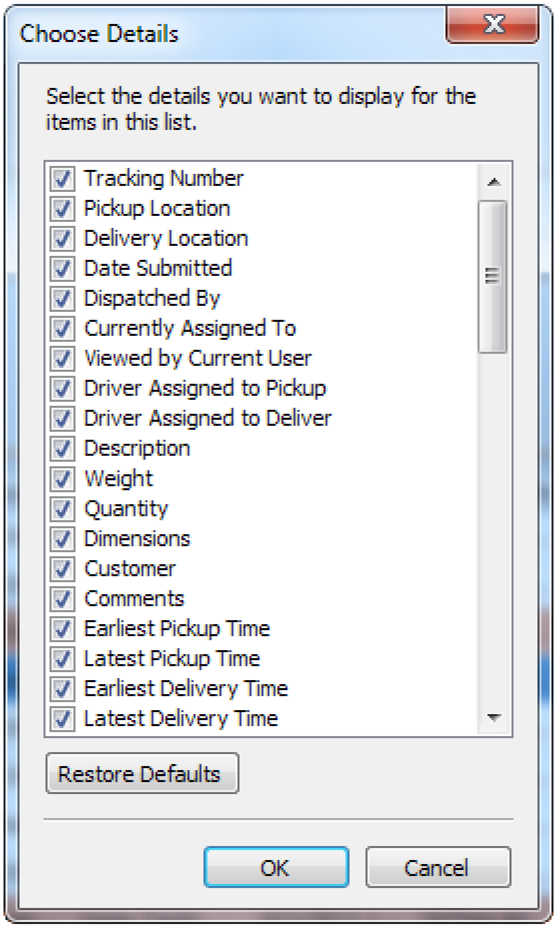
Overview of the Layout

By default, all orders within OnTime are displayed in the main content area, including orders that have been completed, cancelled or billed. This layout was built to ensure that users can access any order in any situation. Even orders that are accidently deleted may be recovered.

The columns in the below list can be rearranged by dragging and dropping them sideways into place. The list can be sorted by a column by clicking on the name of the desired column. Clicking on the name again will reverse the order.

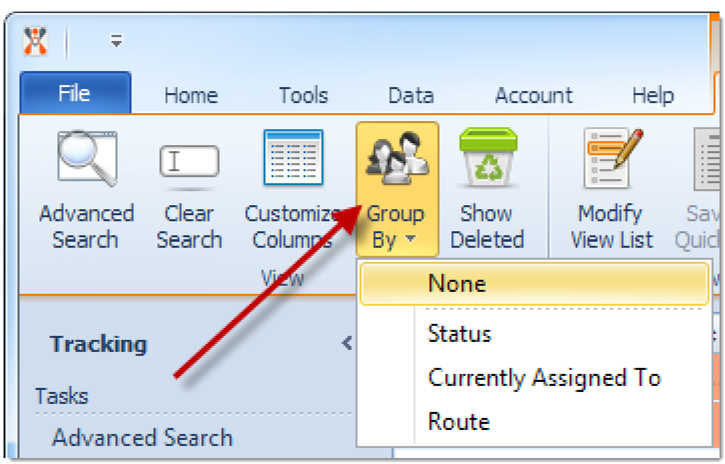


By default, OnTime will show all 50+ available columns in the **Tracking** view. Unimportant columns can be removed to improve the performance of the **Tracking** view. To customize the columns, right-click anywhere within the tracking view list and choose **customize current view**. A window (pictured below) will open with a list the available columns. Utilize the checkboxes to add and remove columns.

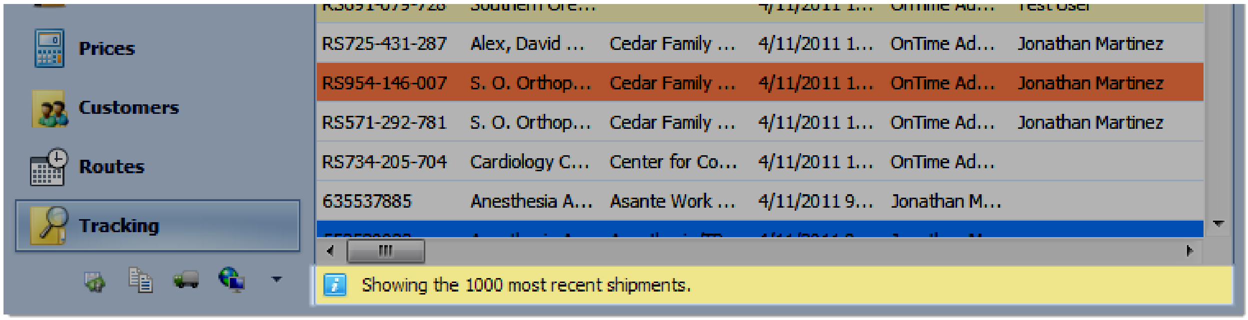


Available columns from customize current view

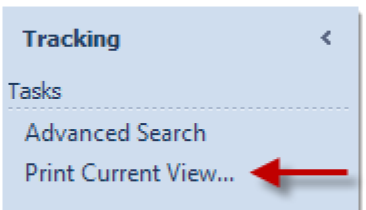
The orders can be grouped by **Status**, **Currently Assigned To** and **Route**. To order by a group, click on the **Group by** button in the **Tracking** tab of the ribbon. Then select the desired option.



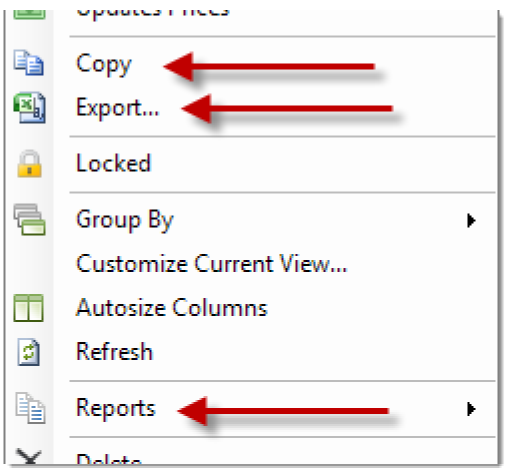
By default, OnTime limits the number of orders shown to the 500 most recent. This limit helps to improve performance. When the list of orders is limited, a note will appear at the bottom of the page:



To quickly print the current contents of the **Tracking** view, click the link labeled **Print Current View...** under **Tasks**:

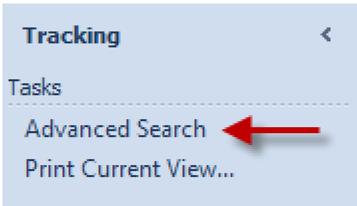


Reports and exporting options may be accessed by right-clicking on a selected order. The appropriate items will be available in the menu that appears, as shown below:

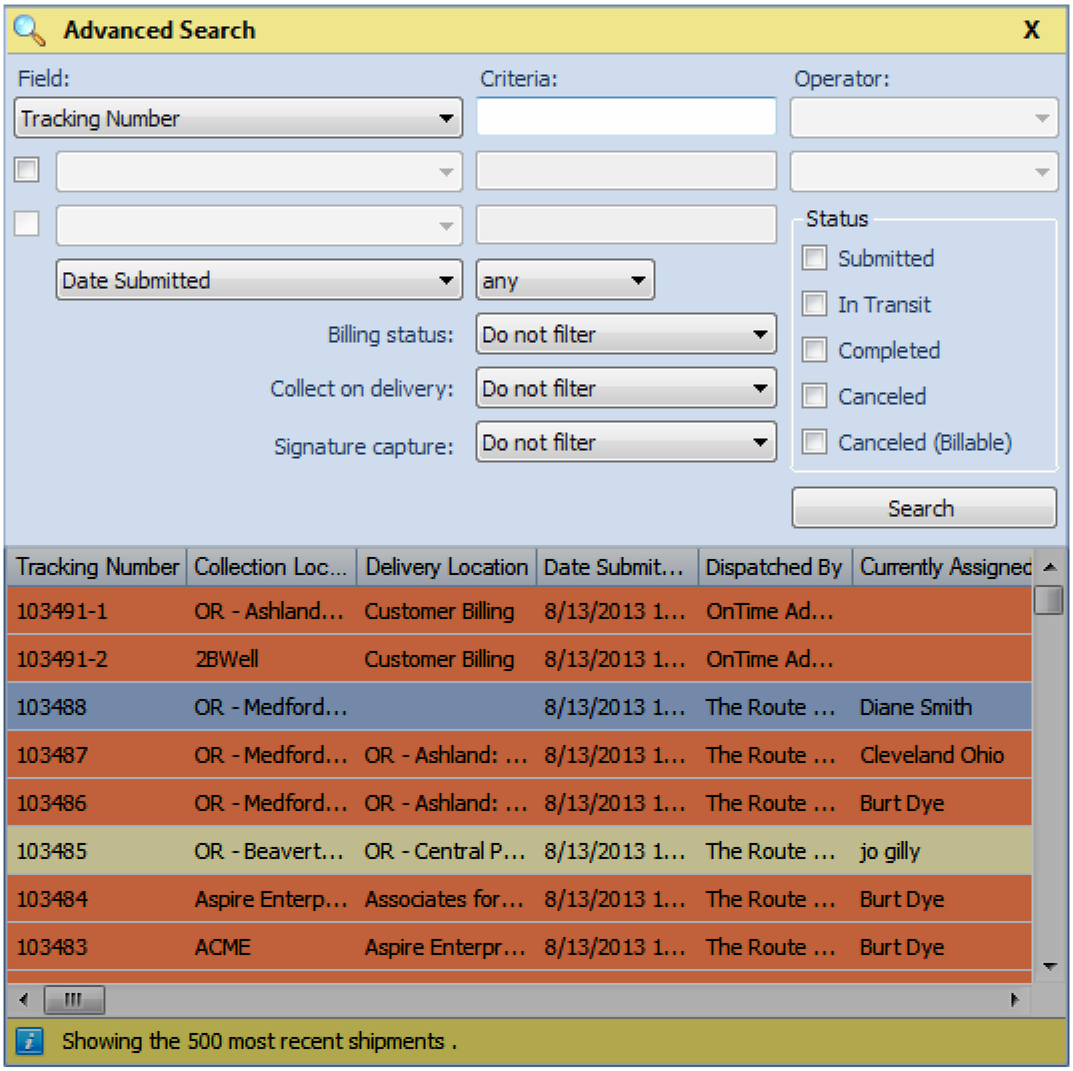


Searching the Tracking View

OnTime has advanced searching capabilities in the tracking view. This functionality ensures that desired information is readily available to OnTime users.

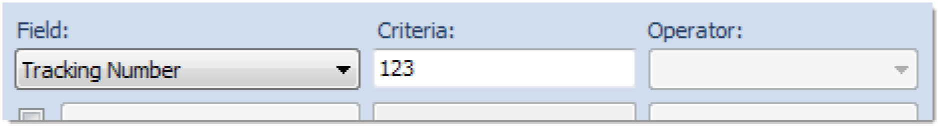


Clicking on **Advanced Search** will cause the top of the tracking view to drop down, revealing the advanced searching area:

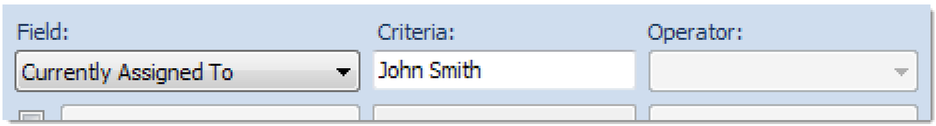


The advanced searching area

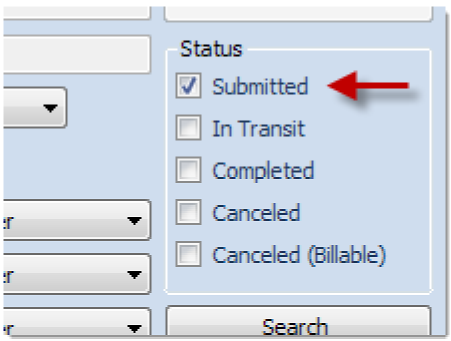
The search results will return all orders if no changes or selections are made. Adjusting the search criteria to match desired results and then clicking the **search** button will display the appropriate results in the tracking view. For example, to search across all orders that contained “123” in the tracking number:



Or to see every order assigned to "John Smith":

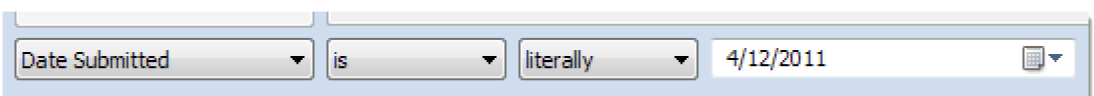


To display only orders that need to be dispatched, check the **Submitted** status:

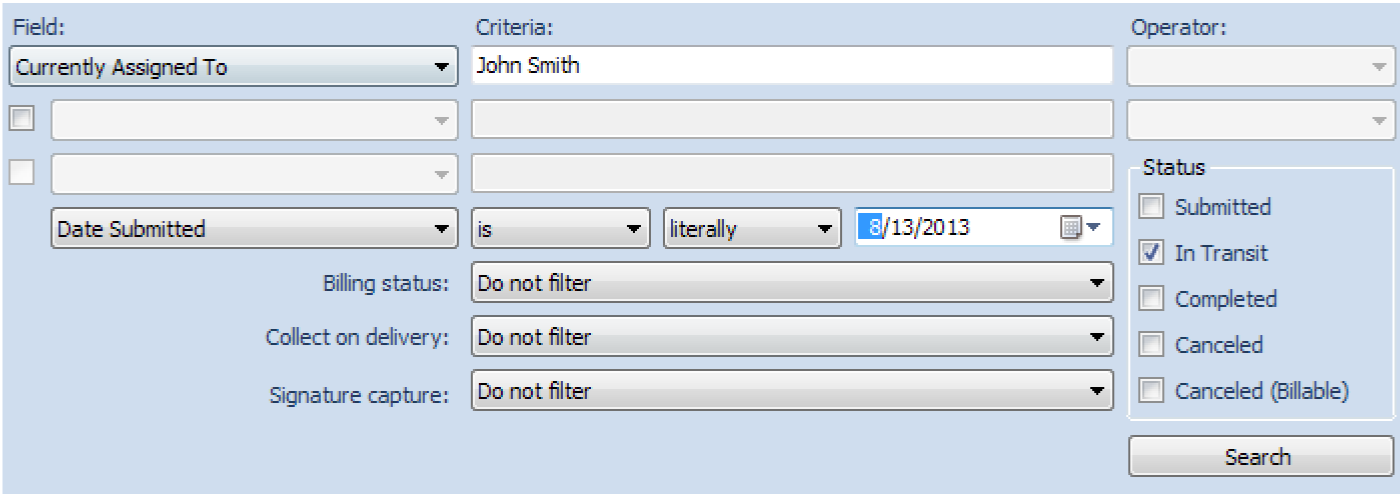


Note: If all **Status** boxes are left unchecked, the search will ignore status altogether and will return orders regardless of status. The results returned by checking none of the boxes would be the same as the results returned by checking all of the **Status** boxes.

To see orders submitted only on a certain day, choose to search by date:



You may combine different criteria into a more complex query. For example, all orders currently assigned to John Smith, in transit, with a date of 4/12/2011 would look like this:

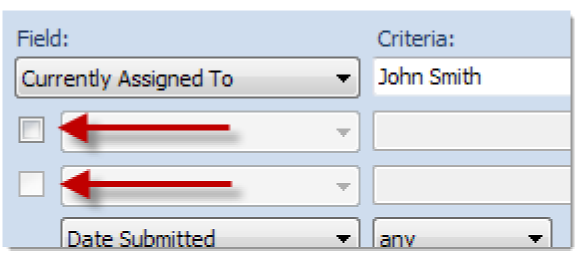


Combining Fields with Operators

Advanced searching allows fields to be combined and operators to be included. Operators combine or exclude certain terms in a search. The three supported operators in OnTime are:

- **And** will find all matches for the criteria entered in the field listed before and after
- **Or** will find all matches for the criteria entered in either the field before or after
- **Not** will find all matches for the criteria in field listed before and will exclude matches for the criteria in the field after

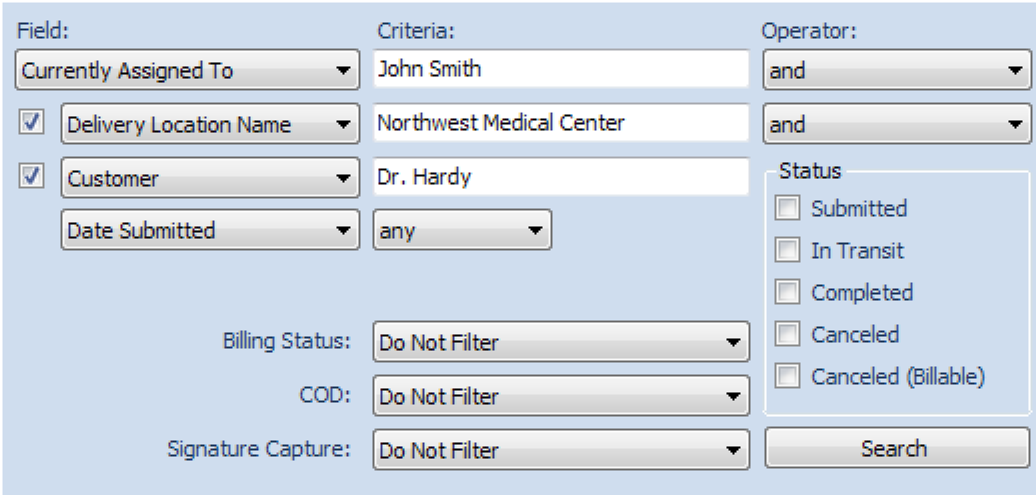
To activate additional fields and their respective operators, check the boxes next to the additional search terms as shown here:



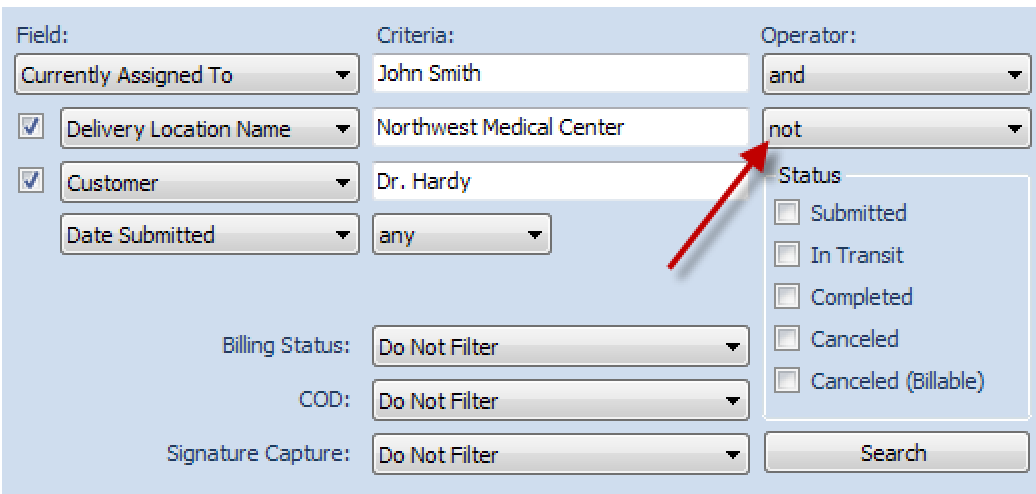
An example of using operators and multiple search terms:

Every order assigned to John Smith **AND** delivered to Northwest Medical Center **AND** with Dr. Hardy as the customer.

Below is a very specific search in which the AND operator is used to combine three separate criteria. Only orders that match all three will be returned. Here's what that would look like in the advanced search panel:



To change the search to exclude results in which Dr. Hardy was the customer:



Changing the operator from "and" to "not" will cause the orders returned by the search to be from customers other than Dr. Hardy.

How Dates are Calculated

Searching by date is very flexible. Some of the dates available to search by include:

- Date submitted
- Scheduled pickup date
- Actual pickup date
- Scheduled delivery date
- Actual delivery date

Once the type of date is chosen, one of the below comparisons may be chosen. Orders associated with both the chosen type of date and comparison will be returned:

- **Any**: All dates
- **Is**: A specific date
- **Is before**: Dates before a specified date
- **Is after**: Dates after a specified date
- **Is between**: Dates that fall between specific starting and ending dates

Next, the date may be specified as static or dynamic. This specification is determined by choosing **Literally** or **Calculate at**.

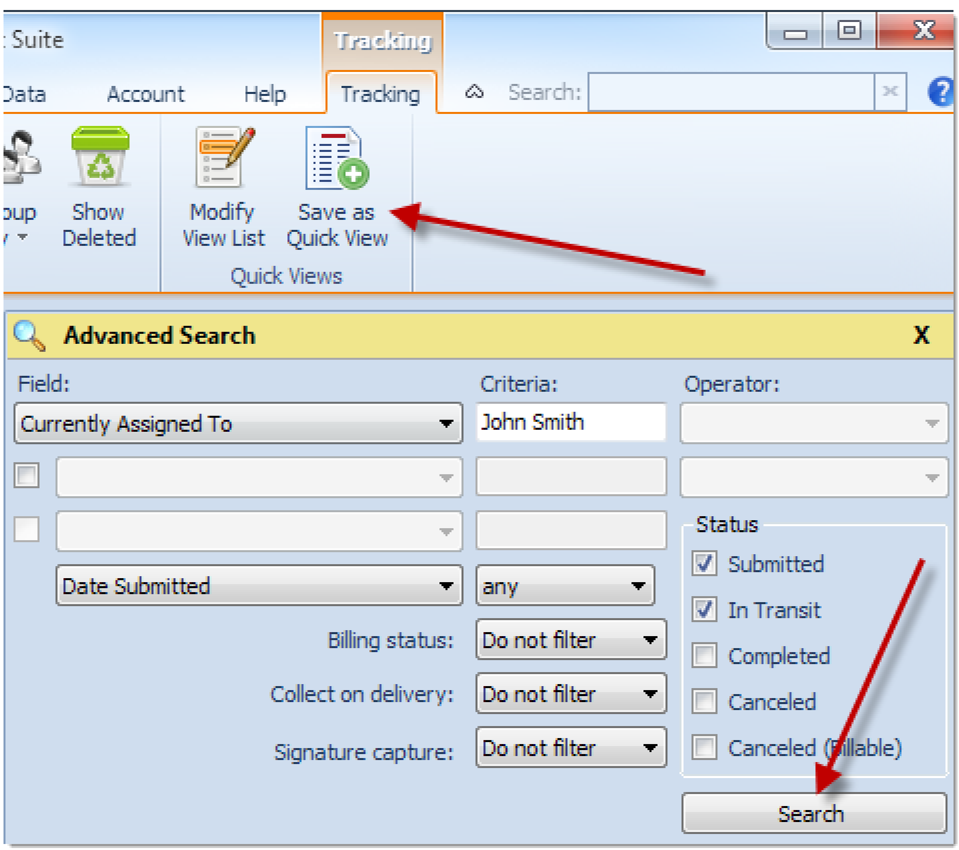
Literally: A specific, static date.

Calculate at: A positive or negative number, used to calculate a date that many days in the future or in the past. This option becomes very valuable when using the **Quick Views** feature. For example, entering a "calculate at" value of "-7" would indicate a date seven (7) days in the past.

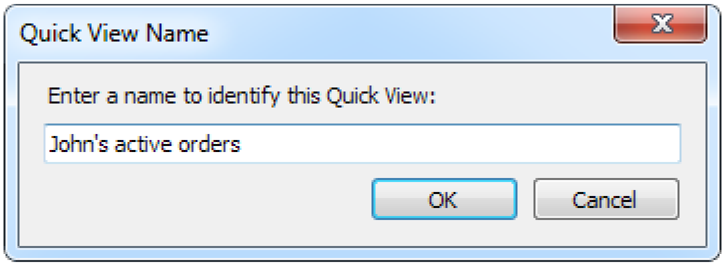
Quick Views

Advanced searches in the tracking view can take a bit of time to construct and make work in the desired fashion. The **Quick Views** feature allows searches to be saved and returned to at a later point.

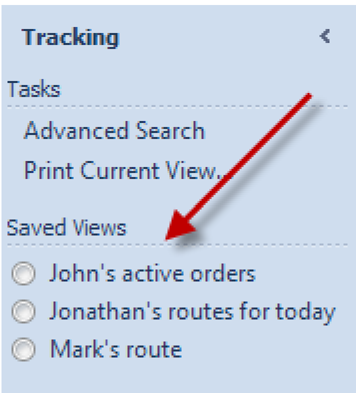
Click the **Search** button in an advanced search. The **Save as Quick View** button will become enabled:



Click on **Save as Quick View** and provide a **name** to easily identify the search later:



The saved view will appear on the left hand side after a search has been saved:

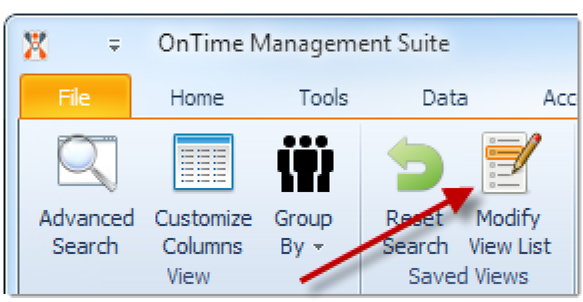


A saved view can be reloaded at any time by selecting from this saved view list. A saved view not only saves the search criteria, but also the column sorting, visibility, and layout.

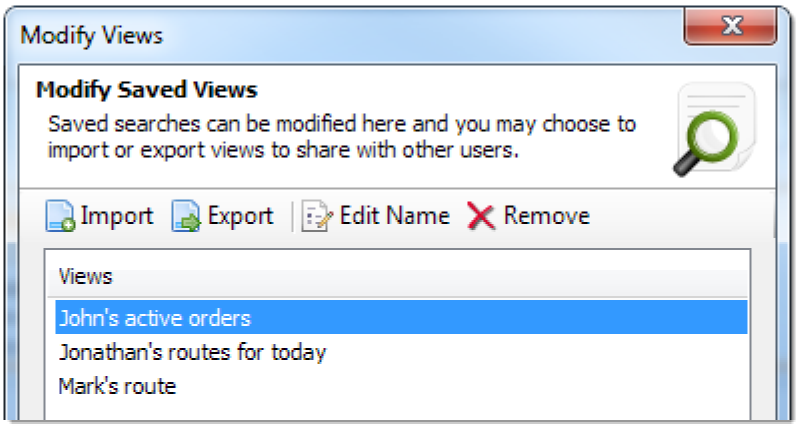
Saved views are extremely useful in customizing the tracking view to be exactly what you need and provide a quick way to back to that information in the future. Views are also the standard way of providing workers the data they need to see to accomplish their jobs. Saved views accommodate their needs by allowing them to see only the data they need, in the format they need it.

To Manage Existing Saved Views

1. Click on the **Modify View List** button in the **Tracking** tab of the ribbon, as shown here:



2. The window that appears will allow existing saved views to be **renamed** and **removed**. Saved views are saved locally to the computer they are created on (*not* automatically synchronized to other computers); however, the **import** and **export** features may be used to move a saved view between computers. The **export** option allows the selected saved view to be saved as a (.OTSV) file. The **import** option will import one of the exported files (.OTSV).



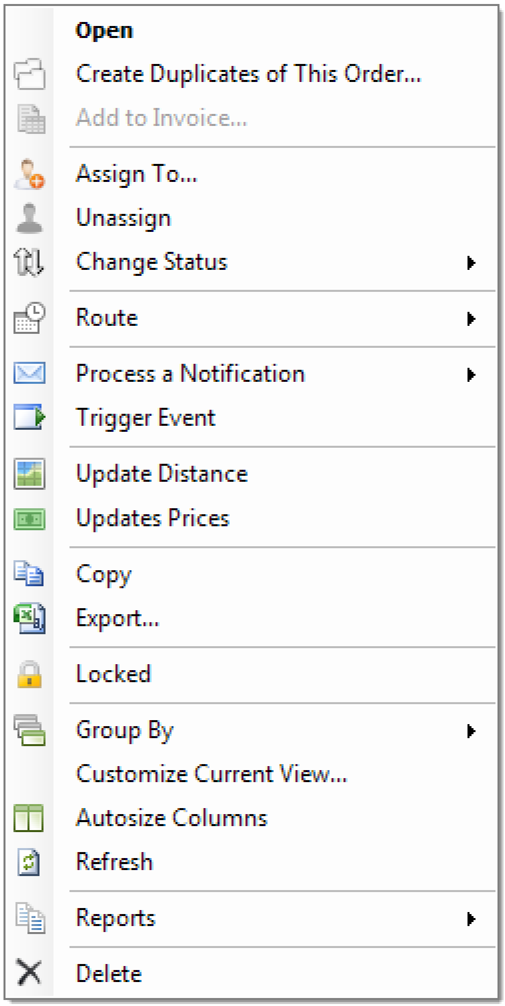
Working with Shipments in the Tracking View

There are two primary ways of working with orders in the tracking view:

- Right-click on an order (or orders) and preform an action
- Double-click on an order and edit the contents of an order

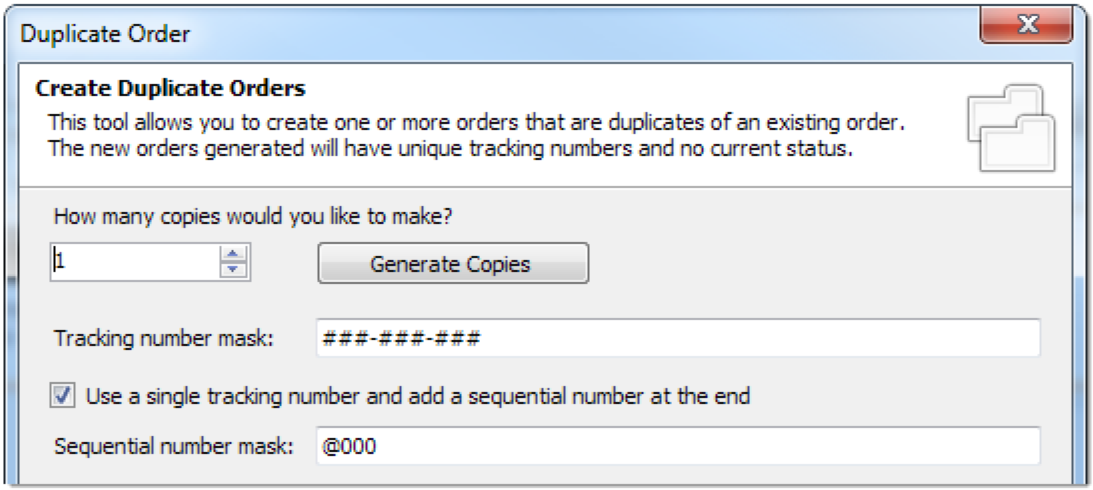
Perform Actions on an Order

Some of the actions available within the context menu (access by right-clicking on orders) in the **Tracking** view are shown here:



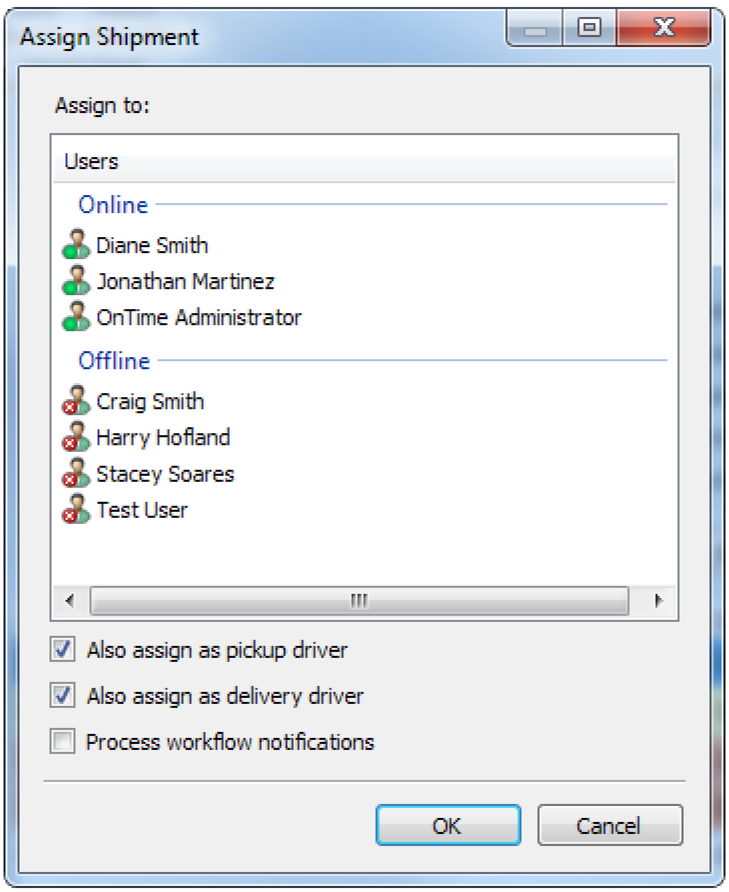
Open: Opens the order for editing

Create Duplicates of This Order: Allows multiple copies of an order to be created. Specify the number of copies desired and modify the mask for the tracking number as necessary. Clicking the **Generate Copies** button will create the duplicates as new orders in the system. All duplicated orders will have unique tracking numbers, which will be listed in the results section.



Assigned To: Assigns the selected order(s) to a specific driver

When selecting a user to assign the order to, three other options appear at the bottom of the window:



- **Also assign as pickup driver**: OnTime maintains a reference to the pickup, or collection, driver, which is important when calculating compensation for the driver. Check this box appropriately.
- **Also assign as delivery driver**: OnTime maintains a reference to the delivery driver, which is important when calculating compensation for the driver. Check this box appropriately.

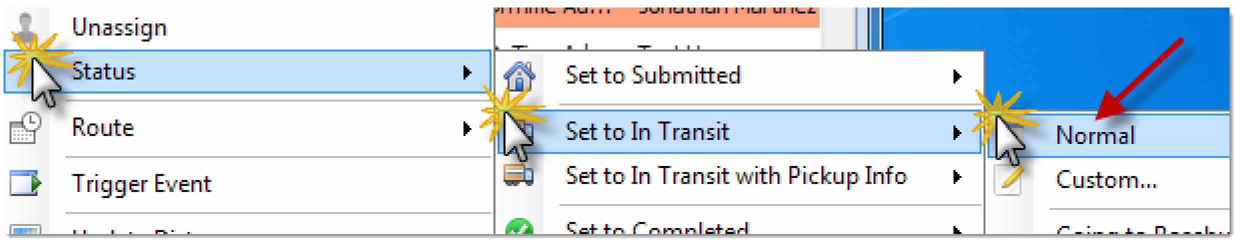
- **Process workflow notifications**: Normally notifications created in the workflow designer will not be processed when assigning drivers from the **Tracking** view. To ensure that they process, check this box.

Unassign: Removes the currently assigned driver. This option places the order back into the unassigned queue.

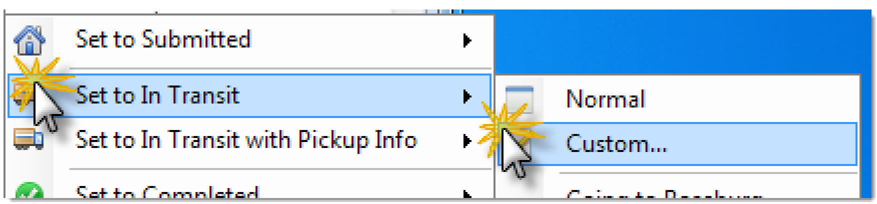
Status: Changes the status on the selected order(s). Order status can be classified into one of 5 main categories:

- **Submitted:** The order has been submitted and is awaiting courier collection
- **In Transit:** The order has been collected by the assigned driver
- **Completed:** The order has been delivered to its destination
- **Canceled:** The order has been cancelled (only possible if the order's current status is submitted or in transit)
- **Canceled (Billable):** The order has been cancelled, but may still be subject to charges (only possible if the order's current status is submitted or in transit)

To set the status of an order, choose Status > Set to... [The appropriate status] > **Normal**. For example, to manually change an order to be in transit:



The **Normal** option sets the status on the order and nothing more. **Status labels** are available to add comments accompanying the status change. The **Custom** menu item is listed below the **Normal** menu item:

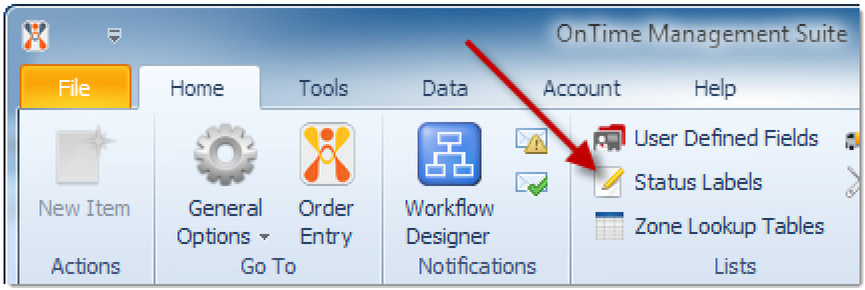


Custom sets the status and allows a time stamped comment about the status change to be entered. Shippers can see a historical view of the shipment and its progress, much like views available with large carriers such as FedEx and UPS.

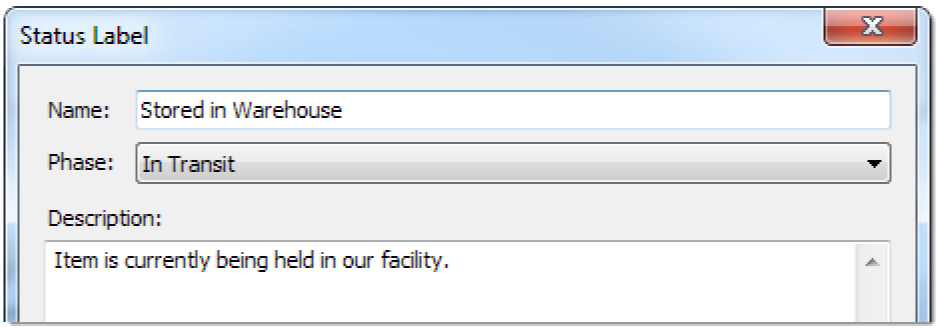
Oftentimes, the same status labels are typed in repeatedly. OnTime allows users to pre-define a list of status labels. Labels can then be chosen from a list instead of being typed in by hand every time.

To Enter a New Global Status Label

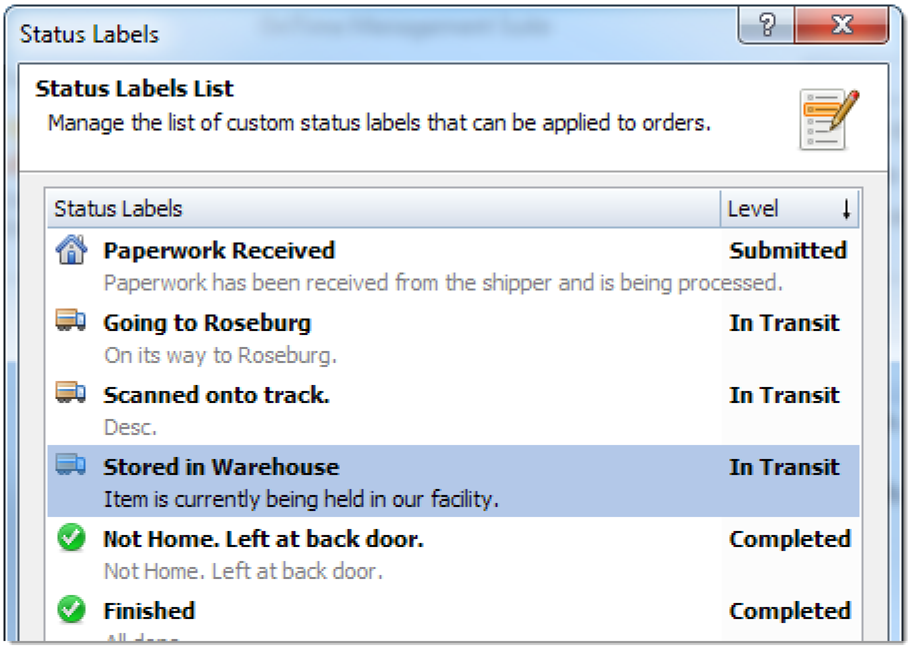
1. Choose **Status Labels** from the **Home** tab in the ribbon:



2. Click on the **New** button at the bottom of the resulting window:

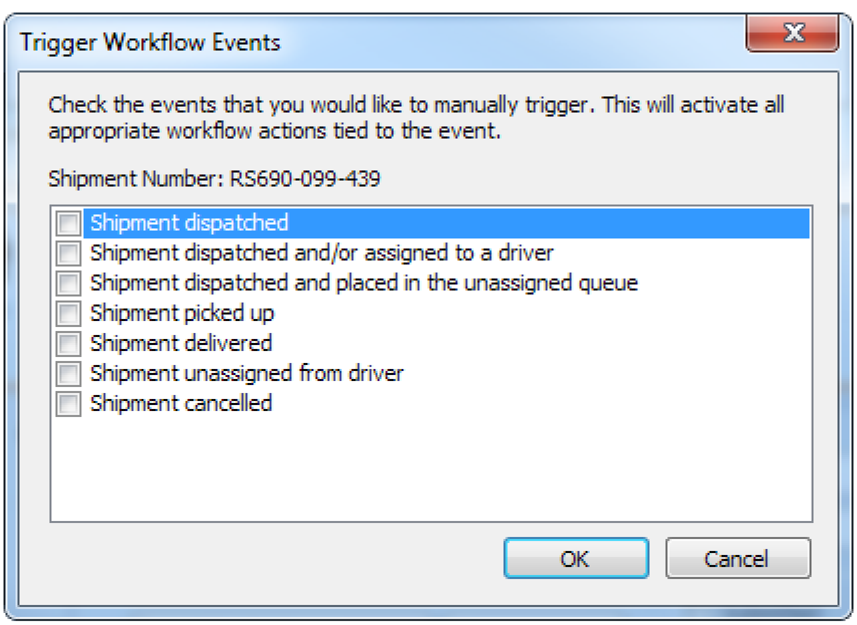


3. Enter a **name** by which to identify the status label. This **name** will appear to workers when they change the status on orders.
4. The **phase** indicates at which status this label should appear.
5. The **description** will appear to the shipper as a detail of what happened to the shipment at that point in time.
6. The variety of status labels that can be utilized provides a consistent and simple method to make status changes to customers' shipments.



Route > **Assign To**: If the selected order is part of a route, OnTime will assign all uncompleted orders on that route to a different driver.

Trigger event: Allows one of these events to be manually activated for the express purpose of triggering all applicable notifications (created in the OnTime Workflow Designer) associated with the order.



The Trigger Events menu

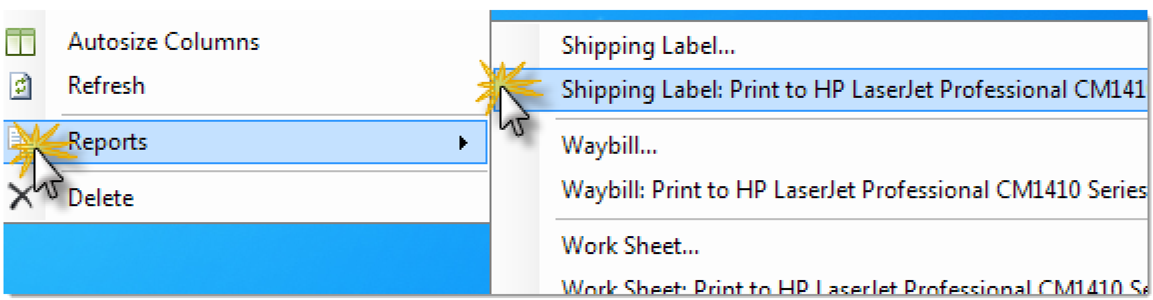
7. Check all of the events to be trigger on that shipment.
8. Click **OK** and the system will process all corresponding notifications.

This option helps to resend notifications. For example, if a customer missed a proof of delivery email, it could be re-sent by right-clicking on the appropriate order and selecting **Trigger Event** > **Shipment Delivered**.

Trigger Events

Other options available from the right-click, **Trigger Event** menu

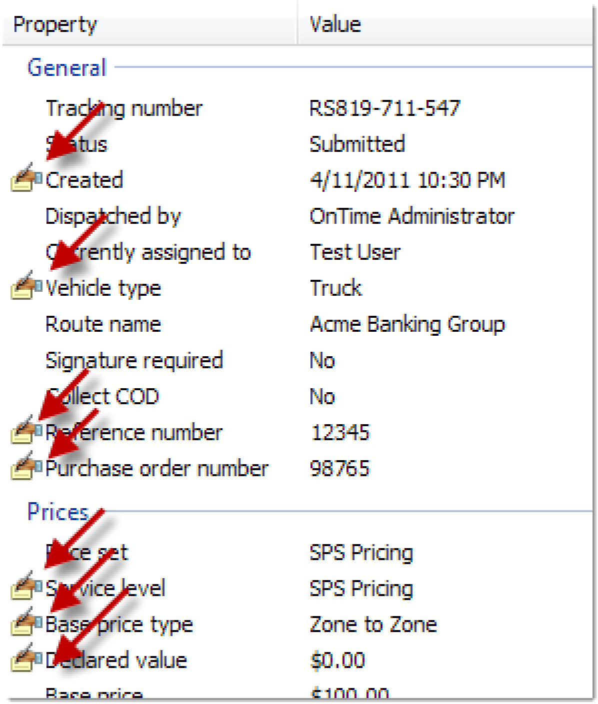
- **Update Distance**: Recalculates the distance on the selected order(s).
- **Update Prices**: Recalculates the total price on the selected order(s).
- **Copy**: Saves the list of orders displayed in the tracking view to the clipboard. This selection can then be pasted into a spreadsheet program, such as Microsoft Excel.
- **Export**: Saves the list of orders displayed in the tracking view to a CSV file.
- **Group By**: Groups the list of orders by the selected column.
- **Customize Current View**: Allows columns to be shown or hidden.
- **Autosize Columns**: Resizes each column to be the width of the largest value within.
- **Refresh**: Reloads the current list of orders.
- **Delete**: Removes the selected order(s) from the system.
- **Reports**: Includes several reports, each one available in a preview mode and a direct print mode. If more than one order is selected to print, each one will be rendered separately. In the preview mode, a separate preview window will open for each order selected. In the direct print mode, as illustrated below, all selected orders will be sent to the printer for batch printing:



> **Note**: The default printer, as configured in Windows, is the printer used by print mode. To use a different printer to perform batch printing, adjust the default printer in Windows.

To Edit the Contents of an Order

1. Enter the tracking view and double-click on the desired order. The order's details will appear.
2. Double-click on any row with an edit icon (as illustrated below) to edit the associated value in the resulting window.

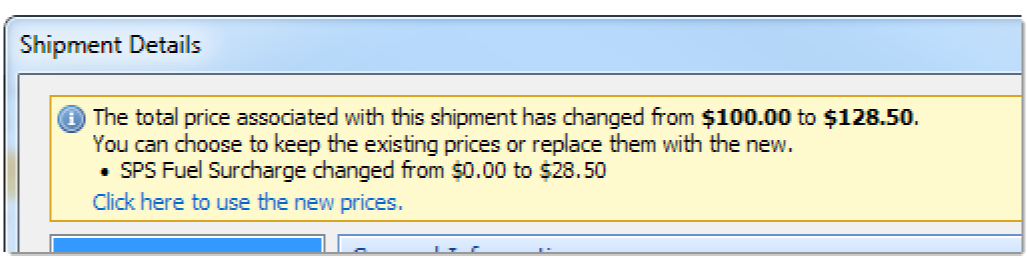


Note: Changing a price set on an order may affect the pricing. OnTime will re-calculate the cost of the base price of the order with the new price set. The associated price modifiers (listed under options) will remain, but will attempt to use the new price set. Because these changes may cause issues, we recommend checking the base price and the pricing options before leaving an adjusted order.

The pricing on orders may be adjusted when price sets and modifiers are modified. In such cases, OnTime will continue to use the prices calculated upon order entry (the cached price).

To Use New Pricing on an Order

1. Open the order:



2. The yellow box at the top of the window is an alert detailing where pricing adjustments are occurring. To use the new prices, click the blue link labeled "**click here to use the new prices**".

Order Details

The following sections are contained in the order details window.

General

This section provides general information about the order including the prices and customer profile.

Locations

This section details the collection and delivery location data, including the courier and arrival times.

Options

This section lists the options, or price modifiers, added to the order. Double-clicking some options within the list will allow for modification. To add new options to the order, choose either **custom** or **add predefined charge**.

Custom: Allows for a miscellaneous charge

Add predefined charge: A drop down list will show all available price modifiers linked to the price set active on the selected order

Signature: Configures the signature requirement on the order for pickup and/or delivery. This option is disabled if a signature type price modifier is not associated with the price set.

COD: Configures the Collect on Delivery (COD) requirement on the order for pickup or delivery. This option is disabled if a COD type price modifier is not associated with the price set.

Items

This section lists the items contained in the order as designated by the dispatcher.

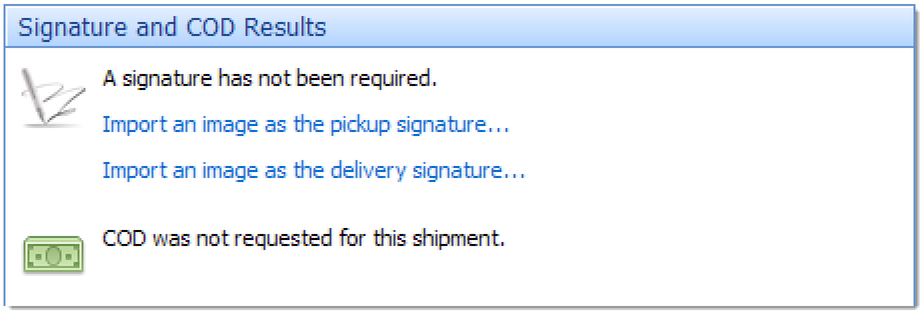
Comments

Description: The public description of the order. Everyone, including the shipper, can view this text.

Comments: Private comments about the order. These comments are hidden from the shipper.

Signature/COD

This section details the results of the signature and/or COD requirements. An image file representing a signature for the pickup and delivery may be manually imported, which is especially useful for drivers who have mobile devices that are incapable of signature capture.



Right-clicking on a signature allows it to be copied to the clipboard and/or saved as a file.

Custom Fields

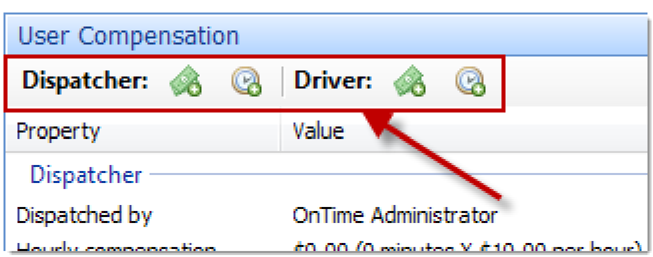
This section lists every active user defined field, along with each field's respective set values. Double-click on the row of any value to make adjustments.

Transfer Log

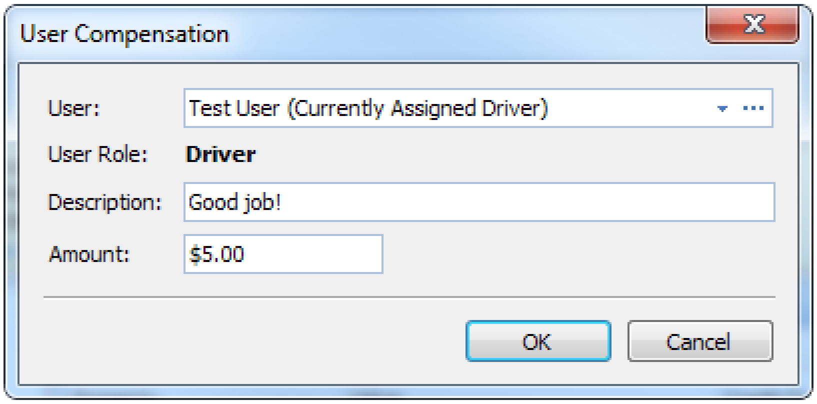
This section will display a log of orders transferred between drivers in the field.

User Compensation

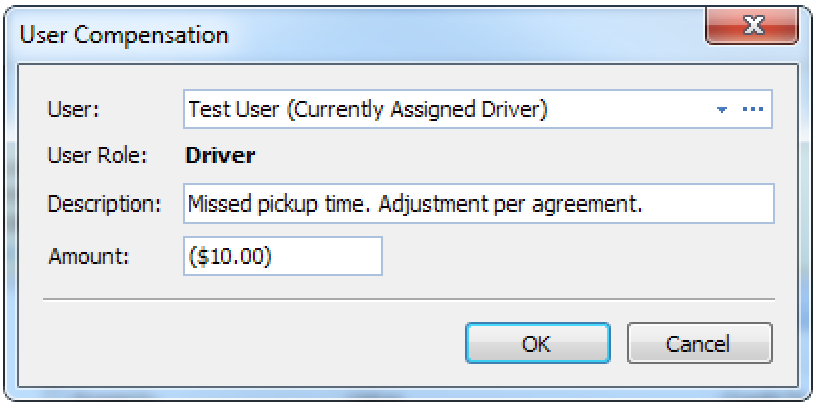
This section breaks down user compensation for the selected order. Adding *time* or *money* to a user (using the buttons in the tool bar as shown below) allows for one-time adjustments to be made to the compensation of that user:



The compensation can be a positive or negative amount. Entering a number plainly (i.e.: $5.00) will indicate a positive value. To enter a negative value, place the value between parenthesis (i.e.: ($5.00)). Further information about the one-time adjustment may be entered into the **Description** field. For example, if we wanted to provide a $5.00 bonus to a driver on this order because of a job well done, we could add this:



However, if we need to deduct $10.00 because of a mistake by the driver, we can do this:

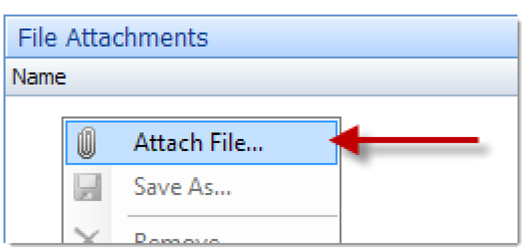


When the user's **Time and Activity** report is generated, these one-time adjustments will be automatically included. Double-clicking on a one-time adjustment in the user compensation list will allow for modifications to be made.

Attachments

Files may be attached to orders, helping to keep scanned paperwork connected with related orders. Any number of files may be attached to an order; however, each file's size must be less than 100 kb.

To attach a file to an order, drag and drop the desired file into the list from Windows. Alternately, right-click in the list and select **Attach File**:



Other users of *OnTime Management Suite* and *OnTime Dispatch* will be able to access and download attached files. To download an attached file, right-click and select **Save As**. Shippers using the *OnTime Customer Web Portal* will also be able to see attached files and can download them directly with a web browser.

Note: We recommend using common file formats, such as PDF, to ensure that customers experience minimal issues opening the files.

History

This section provides a list of all of the changes that have happened to an order. A time stamp and name of the person who made the change appears on every record. The list is sorted chronologically, with the most recent changes at the top. Because this history cannot be altered, the information provided can help to audit issues with an order.

Status Changes

This section lists the status changes added to the selected order. Double-click an existing status to manually change it. . Click the button in the toolbar labeled **Add Custom Status Change** to enter in a custom status label.

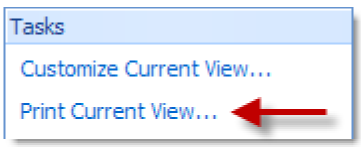
Reporting

OnTime offers several options to report and analyze data. While OnTime if fully capable of communicating with third party reporting and analysis tools, such as Crystal Reports, there are also several robust tools included within *OnTime Management Suite*.

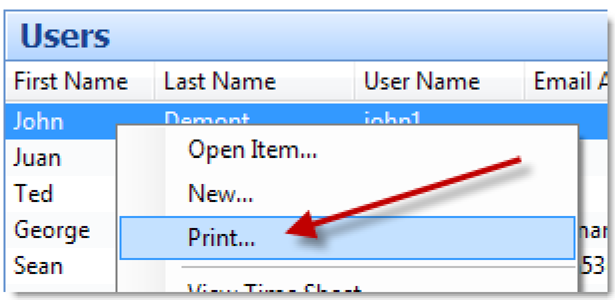
Locating Reports in OnTime

While many courier software solutions only allow access to printable reports from a single location, the OnTime Suite presents reports throughout its programs contextually. Reports are rarely more than a right-click of the mouse away.

A popular report that is available from virtually every major list in OnTime can be found clicking link labeled **Print Current View** on the left:

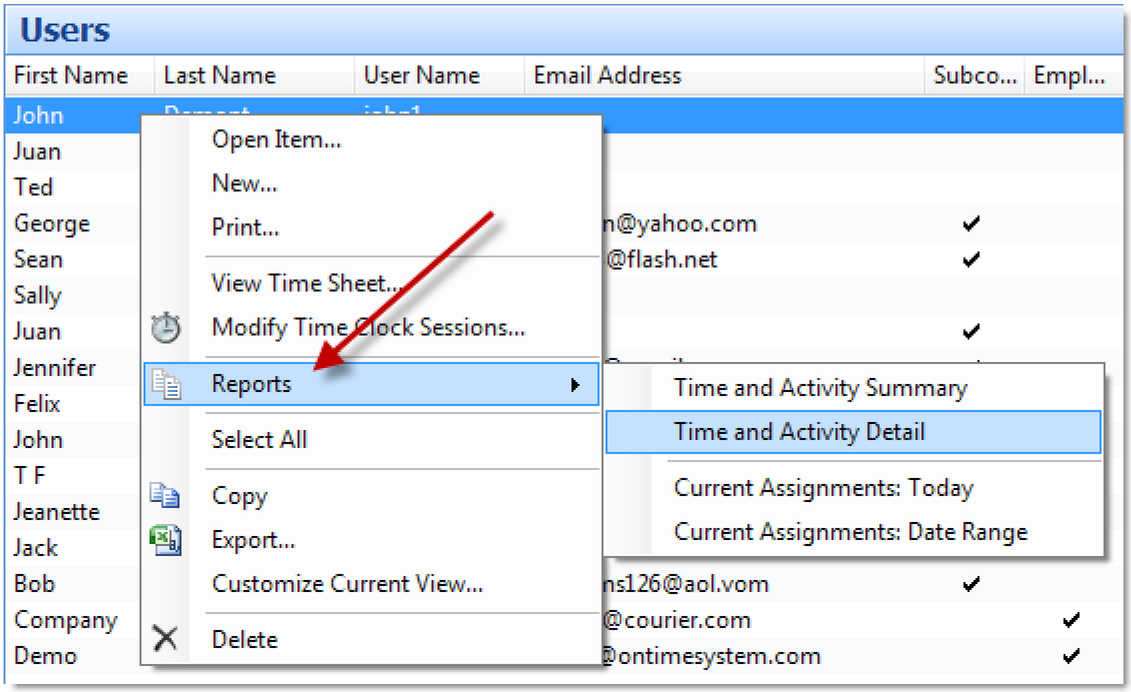


Or by right-clicking on the list and choosing **Print**:



Choosing these options will simply print the chosen list as it appears. This list will reflect any column sorting, reordering, or resizing that has been done.

Other reports can usually be found by right clicking on a list and choosing the **Reports** menu as illustrated here:



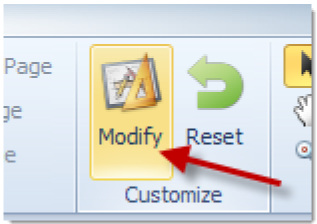
This same Reports menu is available under several of the lists. Here are some of the reports that can be generated in OnTime:

- User Time and Activity Summary
- User Time and Activity Summary
- User Current Assignments for Today
- User Current Assignments across Date Range
- Zone to Zone Price Sheet
- Customers: All Shipments by Date Range
- Driver Route Stop Sheet
- Shipping Label
- Driver Assignment Work Sheet
- Bill of Lading
- Billing Cycle Orders
- Individual Order
- Invoice

Customize Reports

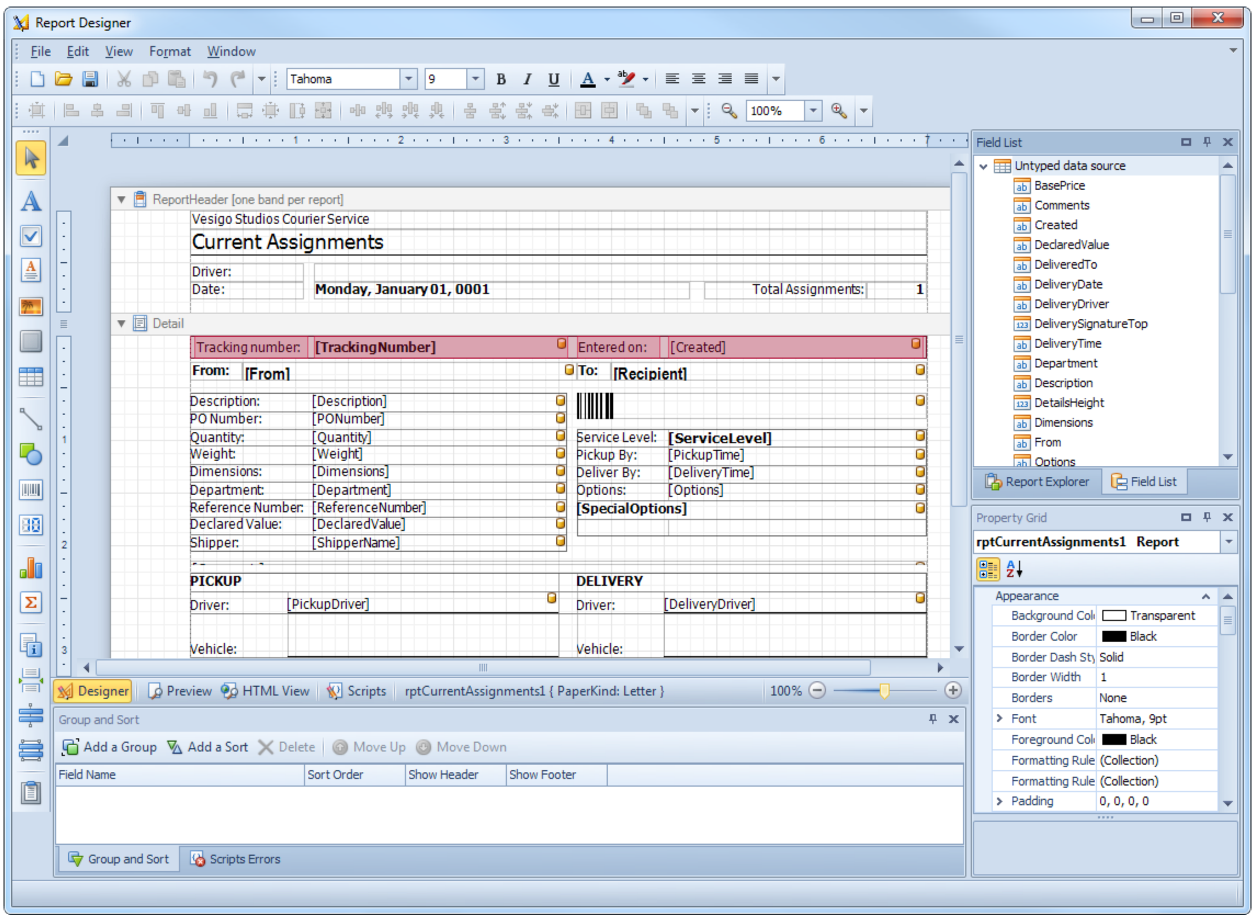
Modifications may be made to reports using the report designer built into OnTime.

1. Load a preview of the desired report. If the report may be customized, a **Modify** button will appear in the toolbar of the preview window as shown here:



Note: If the **Modify Report** button does not appear, the report cannot be customized.

2. Click the **Modify Report** button to launch the report designer.



Authoring Custom Reports

For information on how to author custom reports, please see the section titled Reporting under chapter 3 of this guide.

Billing and Accounting

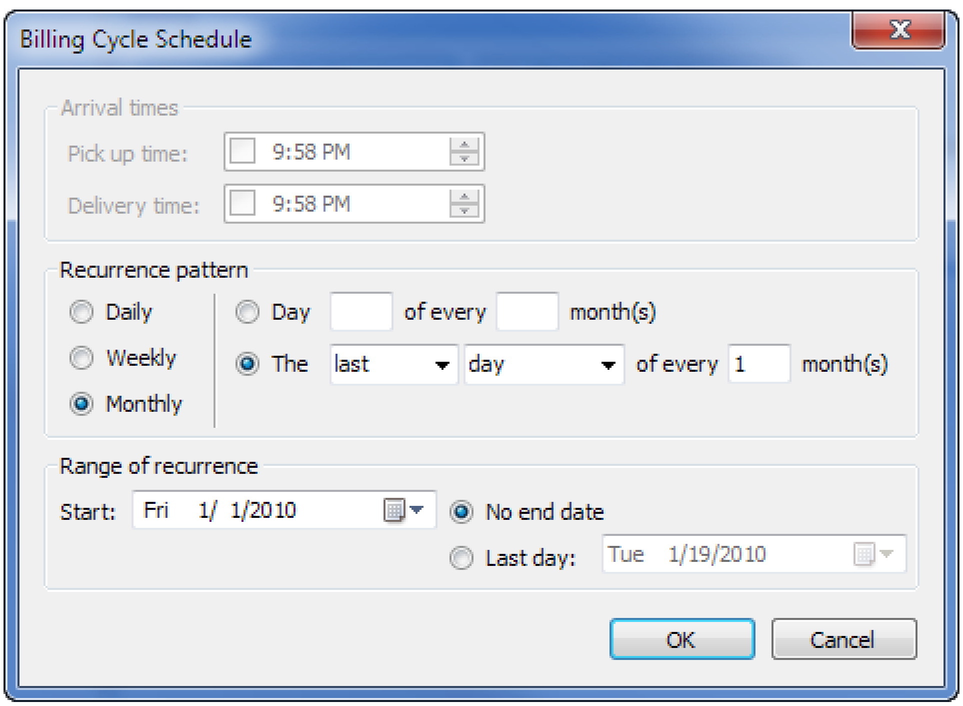
OnTime can help to simplify the important processes of invoicing customers and posting payments received. Because all of the details and pricings of orders have already been entered, OnTime is able to convert that information into an invoice. The generated information can then be transferred into QuickBooks, keeping accounting up-to-date.

Billing Cycles

Each customer can have a unique billing cycle, which helps to accommodate specific billing schedules required by customers.

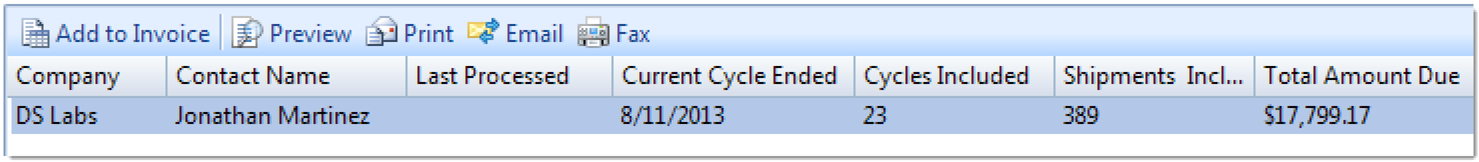
Set a Customer's Billing Cycle

3. Open the customer record
4. Select the **Billing** tab
5. Click **Set Billing Cycle**. A window in which the schedule can be defined will appear:



Sample billing cycle schedule showing once a month on the last day of each month

At the end of each billing cycle, OnTime will automatically aggregate orders entered for the customer during that cycle and display them under the **Billing Cycles** view, as illustrated here:



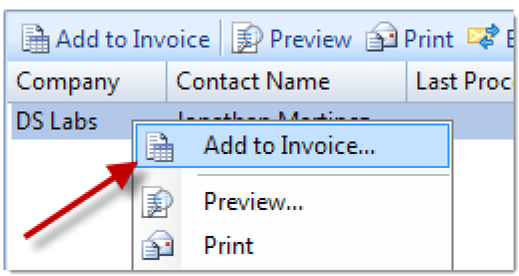
If a previous billing cycle was not invoiced to the customer, that billing cycle will be added to the current one and reflected in the **Cycles Included** column. To generate an invoice of the current billing cycle, right-click on the row and choose **Add to Invoice**.

Invoices

OnTime can create invoices for customers with the information already entered into orders. OnTime also keeps track of which orders have been invoiced and which ones have not, ensuring that nothing of importance is overlooked during the billing process.

Creating Invoices from Billing Cycles

A billing cycle for a customer may be turned into an invoice by right clicking on the billing cycle row and choosing **Add to Invoice**:

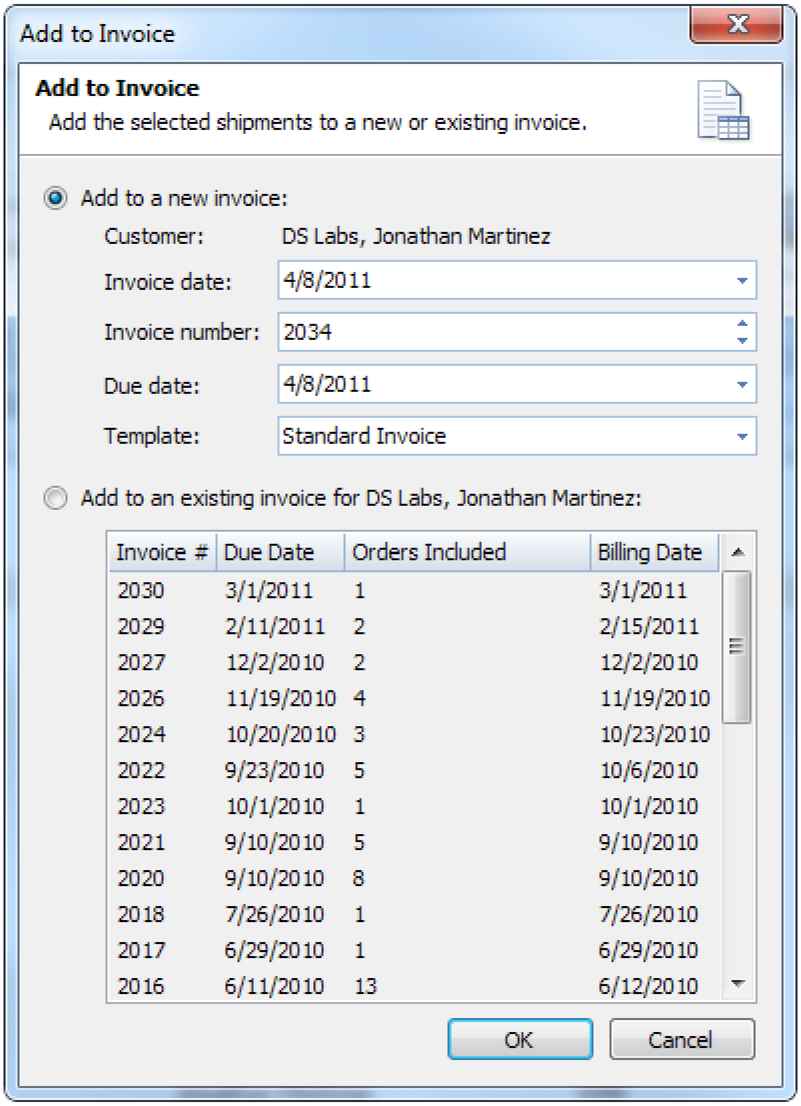


Creating Invoices from Individual Orders

An invoice can be created from one or more orders by manually selecting them, right clicking on the row, and choosing **Add to Invoice**. To add more than one order to an invoice, select more than one item at a time by holding down either the SHIFT or CTRL key while clicking the mouse on the desired items. When selecting more than one invoice in this manner, select only orders that belong to the same customer. Invoices cannot be generated for mixed orders with different customers; the **Add to Invoice** option will be disabled.

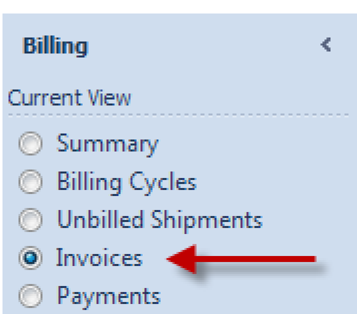
Adding Order to an Invoice

After selecting the source of the orders that will appear in the invoice, the following window will appear:

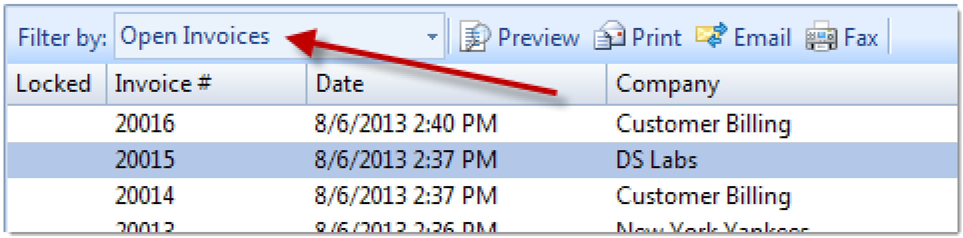


This window offers the choice to add the selected orders to either a new invoice or an existing invoice for that customer. Choose the appropriate selection and click OK. The invoice will now be created.

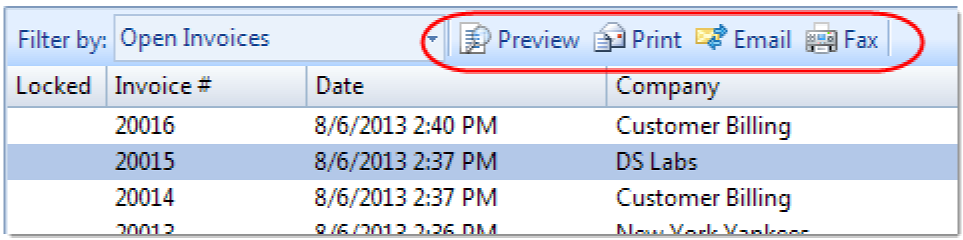
Switch to the Invoices view to see the invoices created:



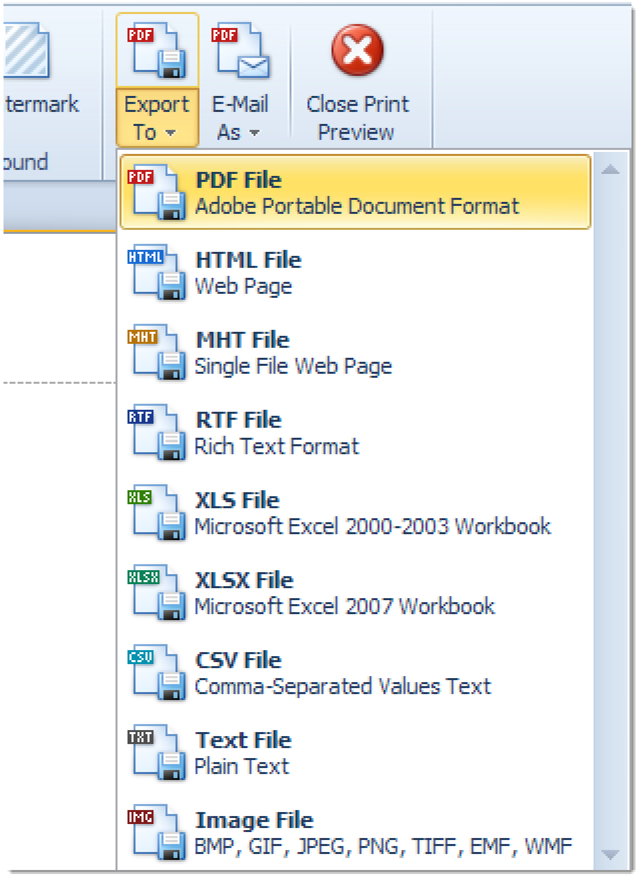
By default, all open invoices will be displayed, which are invoices that have yet to be paid. Change the view by selecting **All Invoices** or **Overdue Invoices** from the **Filter By** menu, as shown below:



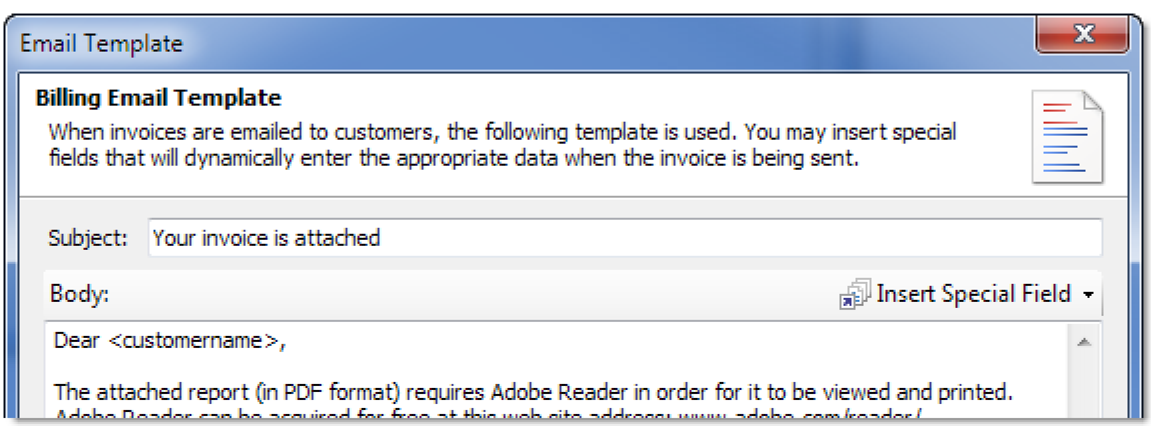
Several options are available to send invoices directly from OnTime to customers: Preview, Print, Email, and Fax.



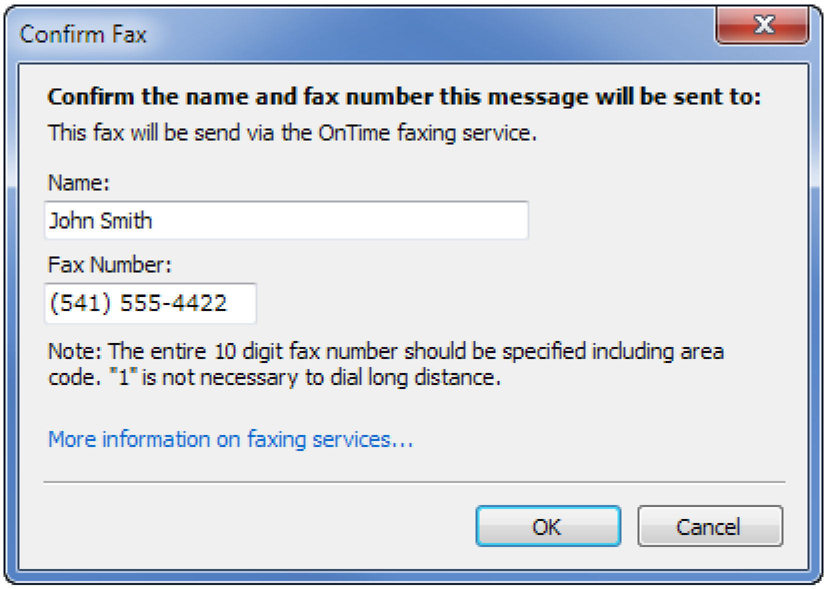
- **Preview**: Select the desired invoice and click the **Preview** button to open a print preview of that invoice. This method also allows for the selected invoice to be exported to a file, such as PDF.



- **Print**: Select the desired invoice and click the **Print** button to send that invoice directly to a printer.
- **Email**: Select the desired invoice and click the **Email** button to send that invoice to the associated customer's billing email address. Confirmation of the name and email address of the customer is required before sending. The invoice will be attached to the email as a PDF file. To customize the text that appears in the body of the email, select the **Home** tab and then choose **General Options** > **Billing** > **Email Template**.



- **Fax**: Select the desired invoice and click the **Fax** button to send that invoice directly to the associated customer's fax machine number. Confirmation of the name and fax number of the customer is required before sending.



Note: Faxing may cost an additional fee per page. Click on **More information on faxing services** to learn about our low cost faxing alternative.

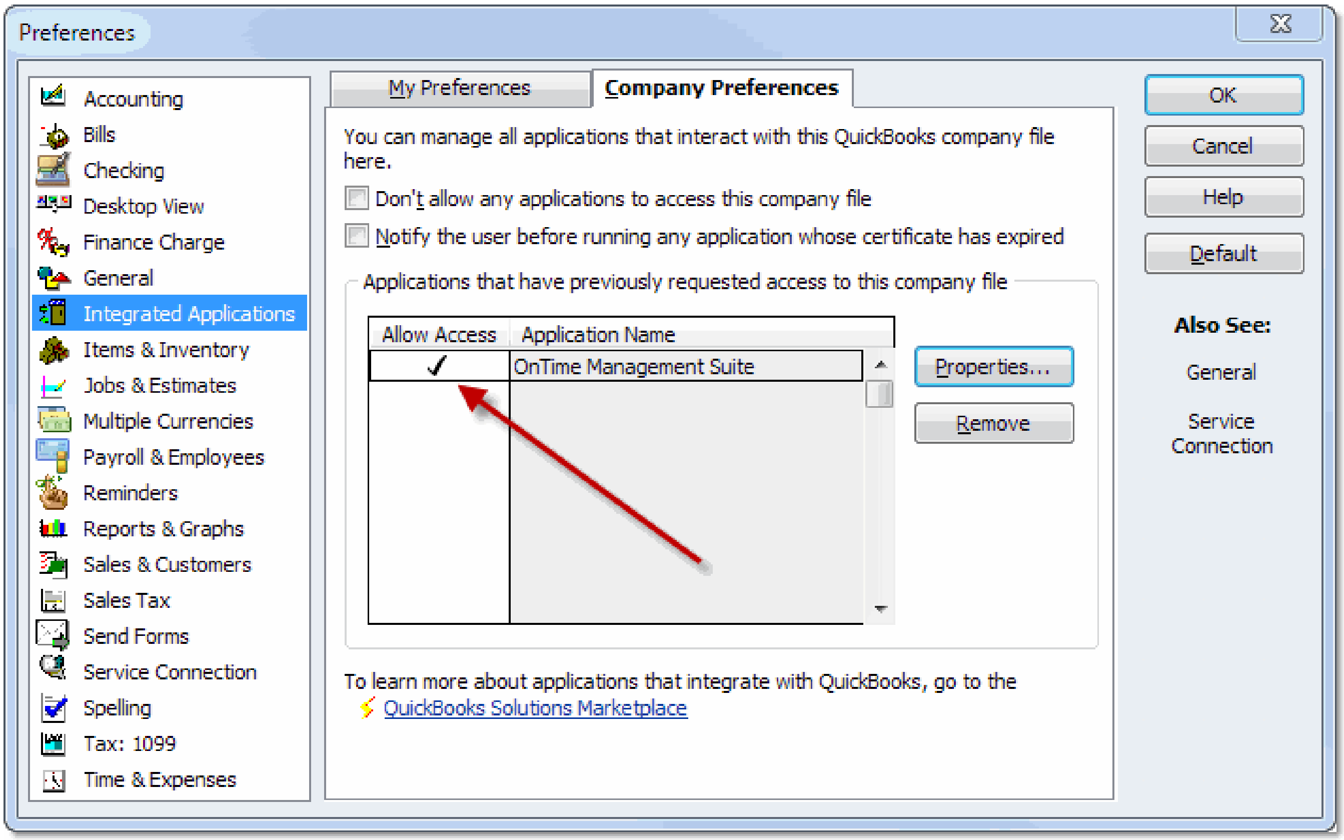
Connecting to QuickBooks

To export transactions from OnTime to QuickBooks, QuickBooks must be informed that OnTime is a trusted program that is permitted to transfer data. QuickBooks will usually display a window when OnTime attempts to communicate data; however, manual configuration of QuickBooks may be required. Try the following steps if a message appears indicating that "QuickBooks could not be started," "QuickBooks is not installed," or "OnTime could not find QuickBooks."

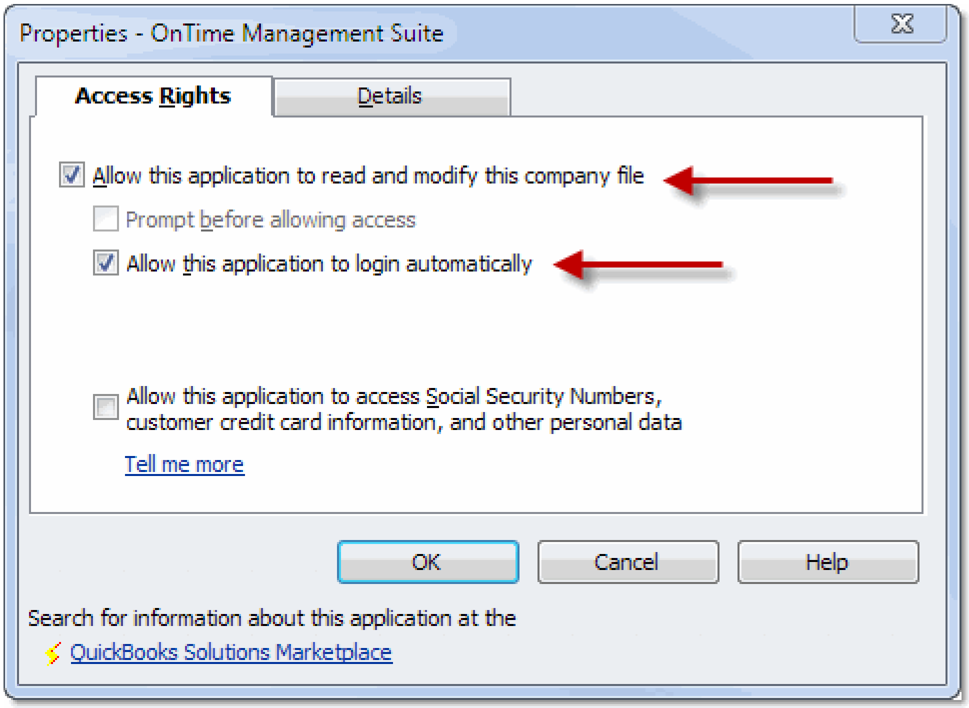
Note: Administrative access to QuickBooks is necessary to adjust some of the settings below. If that access is unavailable, contact your QuickBooks administrator to change these settings.

1. Open the desired company's file in QuickBooks.
2. From *OnTime Management Suite*, attempt to post an invoice or payment to QuickBooks.
3. If a window similar to the one pictured below appears, select **Yes, whenever this QuickBooks company file is open** and click **Continue**.

4. If posting to QuickBooks is still unsuccessful or the window shown above does not appear, continue to step 5.
5. Close all programs and restart the computer. This may help to clear out cached settings in QuickBooks preventing third party programs from properly connecting.
6. Once the computer has restarted, open QuickBooks and the desired company's file.
7. Open the **Edit** menu in QuickBooks and choose **Preferences** > **Integrated Applications**.
8. Select the Company Preferences tab. The check box labeled **Don't allow any applications to access this company file** must be *unchecked*.
9. A check mark must be next to the OnTime entry in the list box as illustrated below:



10. With the OnTime entry selected in the list box, click the **Properties** button.
11. Access rights must be selected as illustrated below:

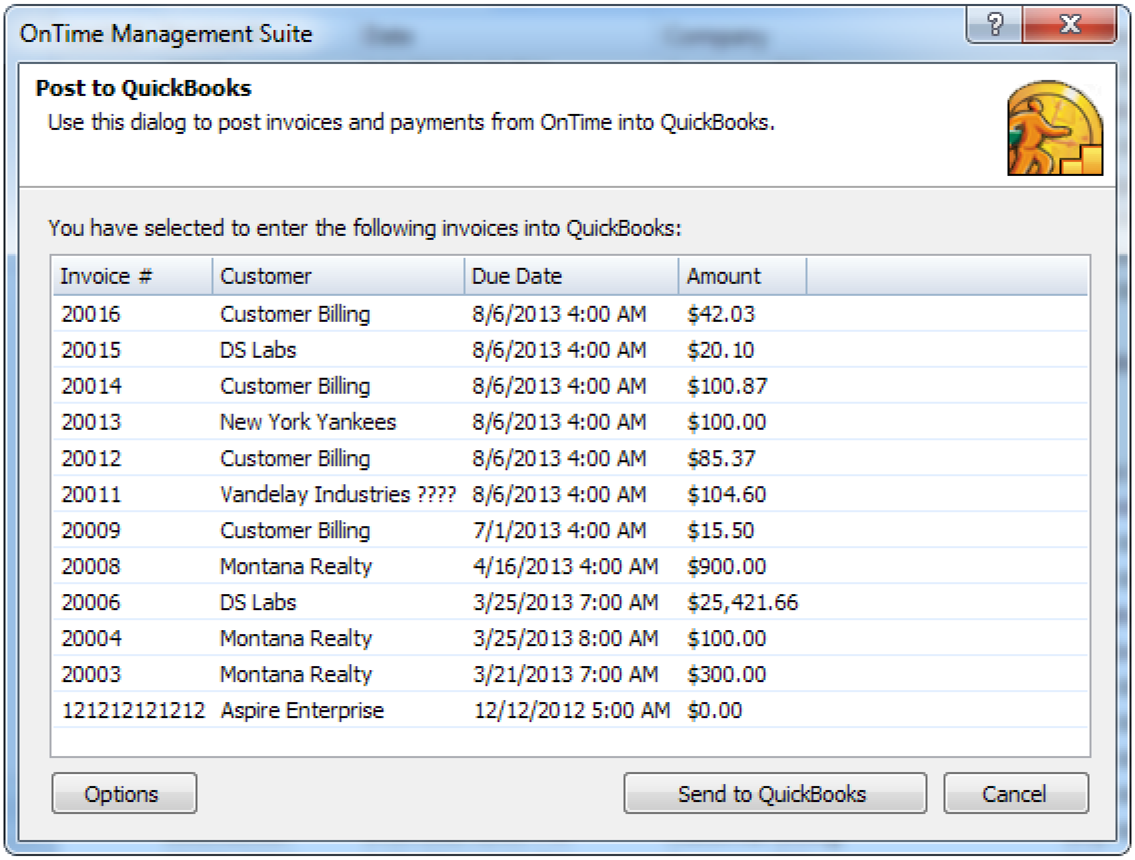


12. Click **OK** to save the changes in QuickBooks and close all windows.
13. Attempt to post an invoice or payment from OnTime.

If problems persist, contact OnTime Customer Support.

Sending Transactions to QuickBooks

OnTime can transfer invoices and payments into QuickBooks 2002 Pro and higher.



Minimum requirements: OnTime requires QuickBooks 2002 Pro or higher. OnTime does not support QuickBooks Basic versions.

How to Export an Invoice to QuickBooks

1. Launch QuickBooks.
2. Open the desired file. The company's file open in QuickBooks is the one that OnTime will connect with.
3. From the **Billing** area in OnTime Management Suite, choose the **Invoices** list.
4. Select one or more invoices from the list, right-click, and choose **Post to QuickBooks**.
5. A window will appear listing the invoices selected to transfer. If the list is complete, click the button labeled **Send to QuickBooks**.
6. If prompted, give OnTime permission to communicate with QuickBooks.
7. Answer any further onscreen prompts to ensure that all information is successfully copied to QuickBooks.

OnTime keeps track of invoices that are transferred to QuickBooks and will issue an alert if the same invoice is sent multiple times. These alerts will not impede users from deleting invoices within QuickBooks and re-importing those invoices from OnTime.

The invoice number in OnTime will be used as the invoice number in QuickBooks. If desired, the invoice number may be changed in QuickBooks.

OnTime requires that the **company name** of a customer exactly matches the **customer name** in QuickBooks. If a match is not found, OnTime can create a new customer record. Keeping the names of customers consistent between OnTime and QuickBooks can help to minimize duplicate customers.

Line items in invoices must be assigned to an **Item** in QuickBooks. OnTime creates a new **service item** in QuickBooks that corresponds to the name of the price set that is assigned to each order. If the **service item** does not exist in QuickBooks and OnTime creates it, it will automatically be assigned to the **Other Income** account in QuickBooks. If the created **service level** should be assigned elsewhere, QuickBooks offers the option to retroactively assign those transactions to the new account.

How to Export a Payment to QuickBooks

1. Launch QuickBooks.
2. Open the desired file. The company's file open in QuickBooks is the one that OnTime will connect with.
3. From the **Billing** area in OnTime Management Suite, choose the **Payments** list.
4. Select one or more invoices from the list, right click, and choose **Post to QuickBooks**.
5. A window will appear listing the payments selected to transfer. If the list is complete, click the button labeled **Send to QuickBooks**.
6. If prompted, give OnTime permission to communicate with QuickBooks.
7. Answer any further onscreen prompts to ensure that all information is successfully copied to QuickBooks.

OnTime keeps track of payments that are transferred to QuickBooks and will issue an alert if the same payment is sent multiple times. These alerts will not impede users from deleting payments within QuickBooks and re-importing those payments from OnTime.

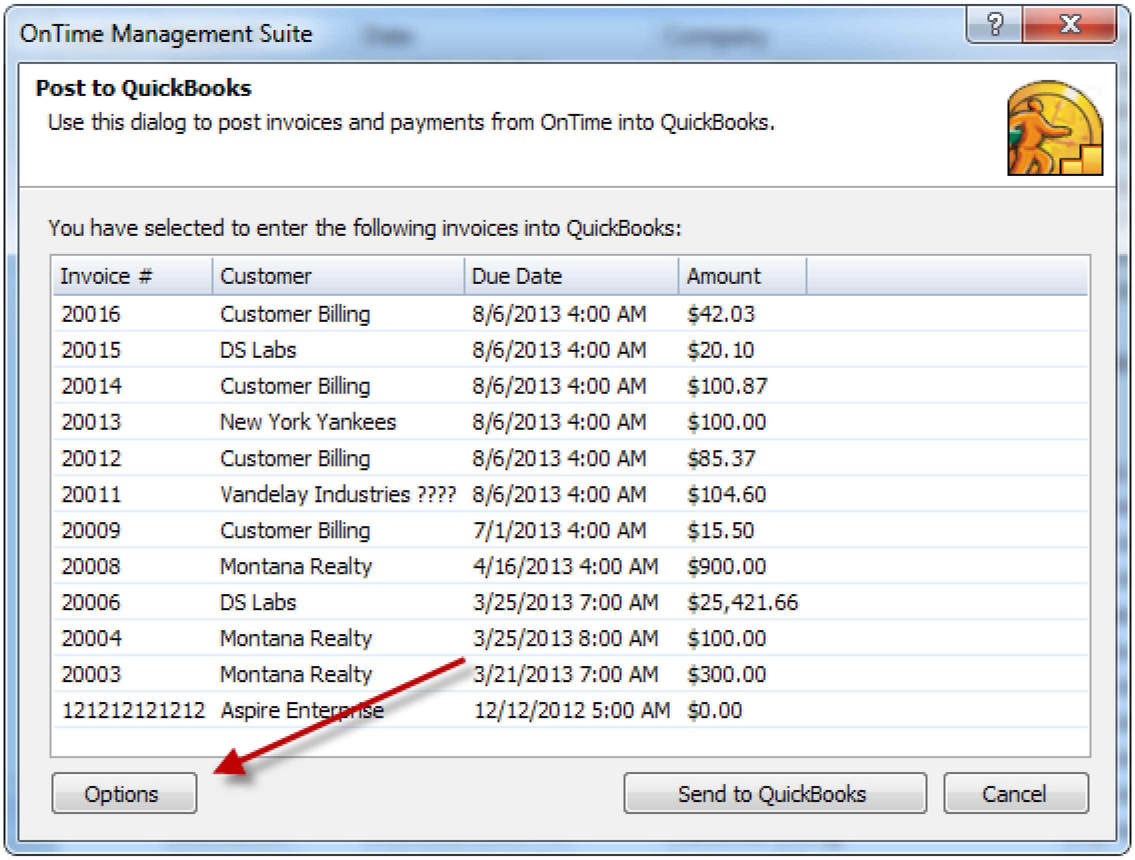
The reference number in OnTime will be used as the payment number in QuickBooks. If desired, the payment number may be changed in QuickBooks.

OnTime requires that the **company name** of a customer exactly match the **customer name** in QuickBooks. If a match is not found, OnTime can create a new customer record for you. Keep the names of customers consistent between OnTime and QuickBooks in order to minimize duplicate customers.

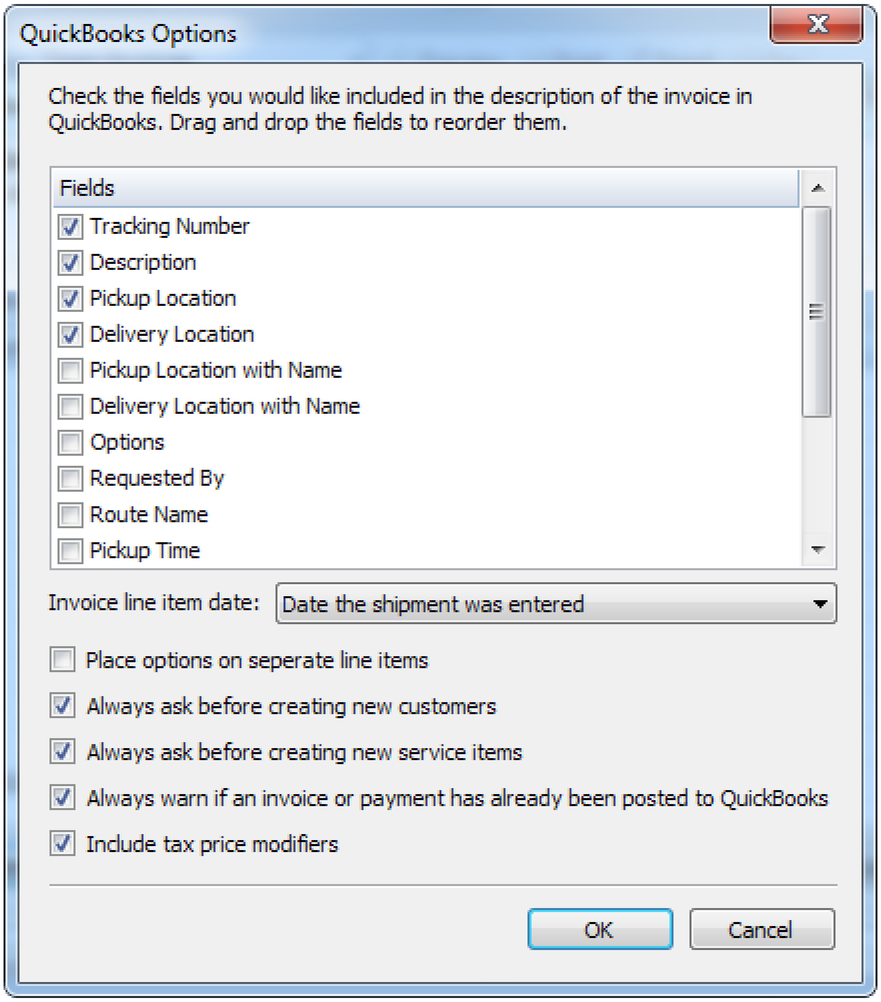
OnTime will automatically attempt to apply payments to invoices as you've specified; however, this is subject to those invoices existing in QuickBooks so that the payment in QuickBooks can be applied correctly.

Customize the Information on QuickBooks Invoices

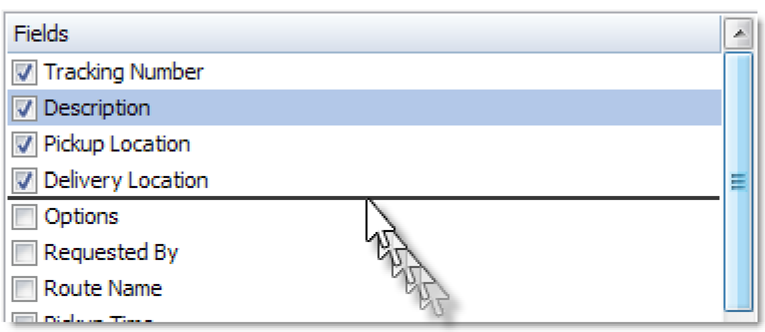
To customize the information that is put into invoices sent to QuickBooks via OnTime, utilize the **Options** button as shown below:



After clicking the **Options** button, a list of fields will appear. These fields will appear in each line item in the invoice under the *description*. Check the items in the list to be included:



To rearrange a field's order of appearance in the list, select and drag the field to the desired placement:



Invoice line item date: May be either the submission date or delivery date of the order

Place options on separate line items: Creates a line item on the invoice for the order and lists the base price. A new line item will then be added for each price modifier on the order, with prices listed individually.

Always ask before creating new customers: OnTime will try to find exact matches for customers already in QuickBooks. If an exact match is not found, OnTime will automatically create the customer in QuickBooks. If this option is checked, a prompt will appear each time a new customer needs to be created in QuickBooks.

Always ask before creating new service items: OnTime will try to find exact matches for service items already in QuickBooks. OnTime treats price modifiers on an order as service items in QuickBooks. If an exact match is not found, then OnTime will automatically create the service item in QuickBooks. If this option is checked a prompt will appear each time a new service item needs to be created in QuickBooks.

Click **OK** to save the changes.

Administration and Customization

Every company's specific business methods vary slightly. This section describes some ways that OnTime may be changed to adhere to specific company business styles.

Starting *OnTime Dispatch* with Command Line Arguments

OnTime Dispatch may be started using command line arguments that contain log in information. This functionality makes logging into different accounts quicker and helps to frequently switch between company accounts. This option allows OnTime Dispatch to launch from another application.

The following arguments are available:

-c:
The Company ID

-u:
The User Name

-p:
The Password

To Launch *OnTime Dispatch* Using Command Line Arguments

1. Launch the OnTime Dispatch executable file, which is OTDispatch.exe, in the following format:
   `OTDispatch.exe –c:"MyCompanyID" –u:"MyUserName" –p:"MyPassword"`

Chapter 9: Troubleshooting

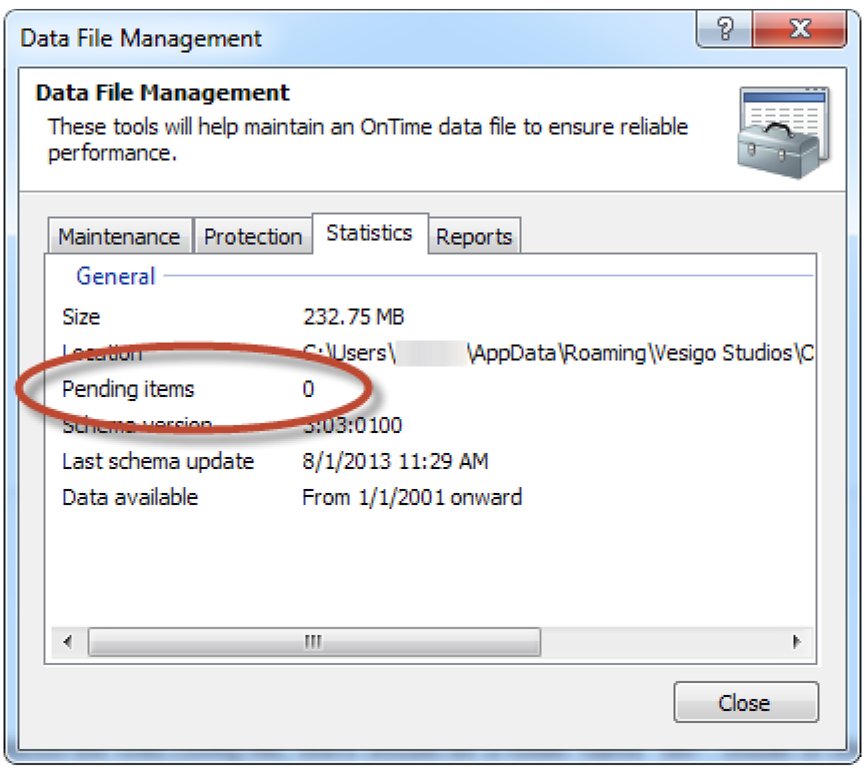
OnTime may occasionally behave in unexpected ways. Gathering information for troubleshooting is an important step to help to find a solution. Information gleaned through attempted troubleshooting can also help to explain the issue if contacting OnTime Technical Support becomes necessary. This section includes some practical troubleshooting suggestions.

How to Rebuild the Data File

The data file may need to be rebuilt on occasion. This rebuild may help your computer to take advantage of new features that OnTime will sometimes implement and often resolve synchronization issues.

> **Note:** If any information from OnTime has been added, modified, or removed since the last time OnTime was synchronized with the OnTime service, be sure to perform such synchronization to ensure that those changes are saved.

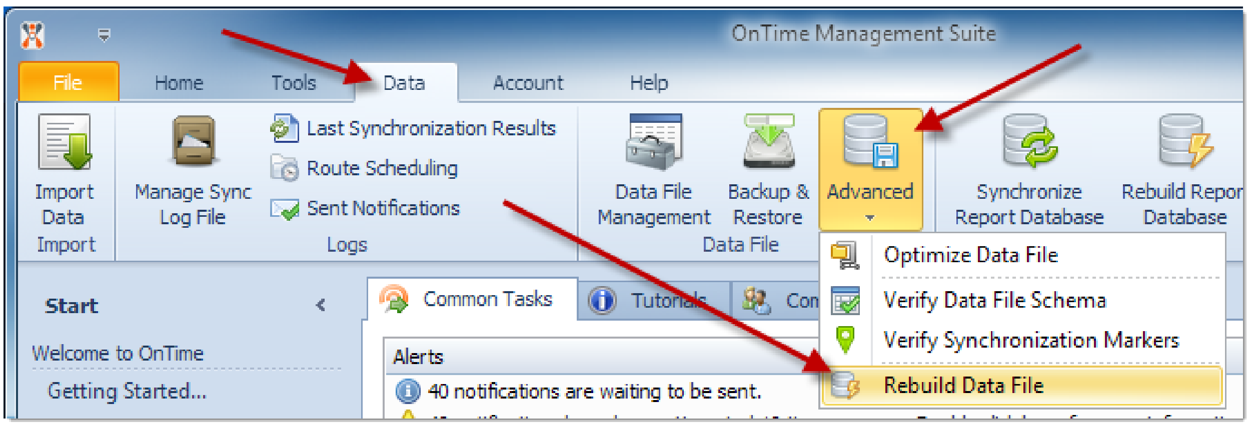
The number of pending changes is viewable in the **Data File Maintenance** area, as shown here:



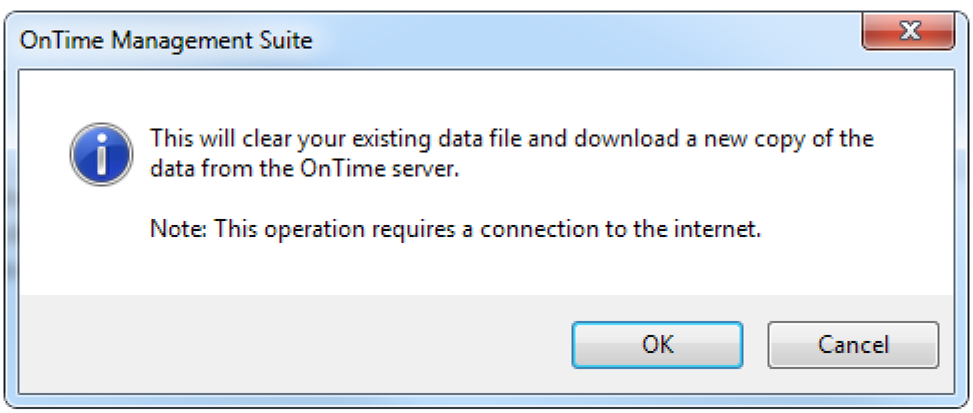
> **Note:** If both *OnTime Management Suite* **AND** *OnTime Dispatch* are installed on the same computer, the data file does not need to be rebuilt in both programs. Because both programs share the same data file, it can be rebuilt in either one of the programs.

How to Rebuild the Data File in *OnTime Management Suite*

1. Go to the **Data** tab in the ribbon
2. Click on the **Advanced** button
3. Click Rebuild Data File



4. The following message will appear asking for confirmation.

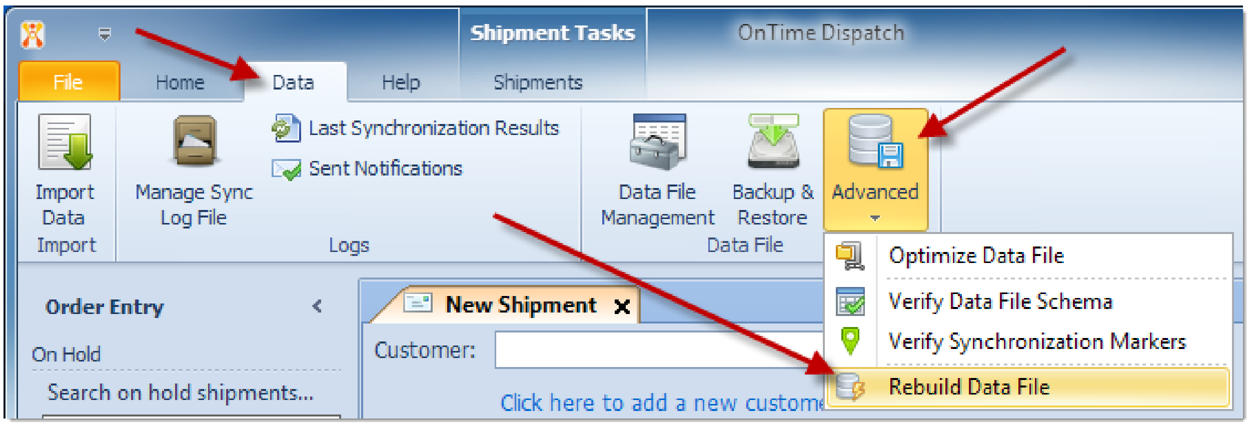


5. Click **OK** to continue
6. At this point, the rebuild may proceed and a progress indicator will appear in the lower right corner of the application. Once it reaches 100% the rebuild should be completed.
7. If a lock cannot be made on the data file, another message box may appear asking to restart the program to complete the process. If that message appears, close down all OnTime applications running on the computer – both *Management Suite* and *Dispatch*.

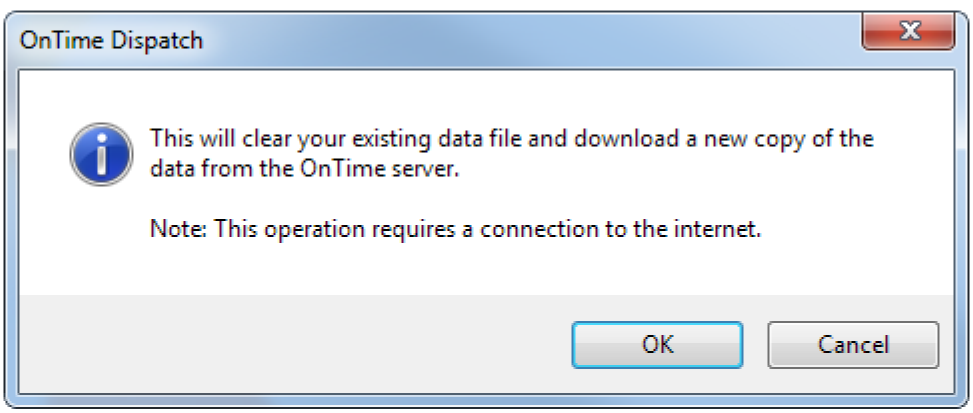
8. Open and sign in to the *OnTime Management Suite* program only. Do not start both programs. Once signed in, a message indicating that the rebuild is in progress should appear. The rebuild will be completed when the progress indicator in the lower right corner of the application window has reached 100%.

How to Rebuild the Data File in *OnTime Dispatch*

1. Go to the **Data** tab in the ribbon
2. Click on the **Advanced** button
3. Click Rebuild Data File



4. The following message will appear asking for confirmation:

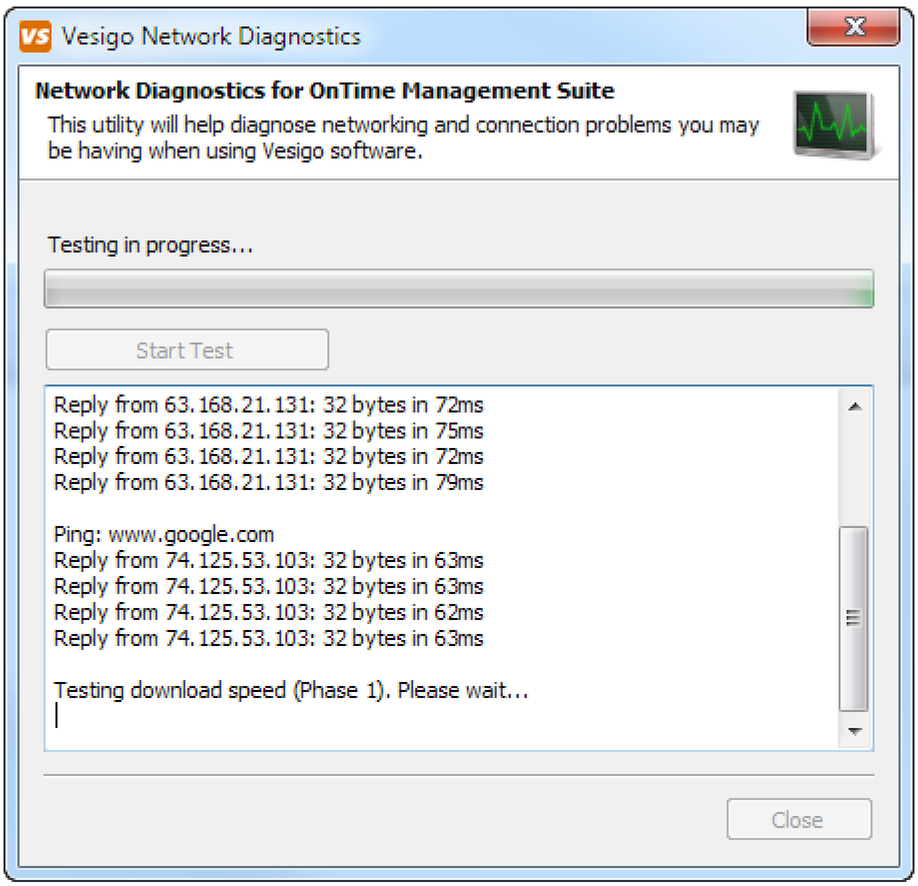


5. Click **OK** to continue.
6. At this point, the rebuild may proceed and a progress indicator will appear in the lower right corner of the application. Once it reaches 100% the rebuild should be completed.
7. If a lock cannot be made on the data file, another message box may appear asking to restart the program to complete the process. If that message appears, close down all OnTime applications running on the computer – both *Management Suite* and *Dispatch*.

8. Open and sign in to the *OnTime Management Suite* program only. Do not start both programs. Once signed in, a message indicating that the rebuild is in progress should appear. The rebuild will be completed when the progress indicator in the lower right corner of the application window has reached 100%.

Help with Troubleshooting Networking and Internet Issues

OnTime desktop applications' built-in network diagnostic tools offer assistance with troubleshooting networking problems. If the performance of OnTime across your network and internet connection is inadequate, running the test in the utility will help to diagnose the problem's source. This information also helps Vesigo technical support personnel resolve connectivity issues.



If problems with connection to the OnTime service are possible, run this utility and then contact Vesigo technical support with the details. To access this feature:

From *OnTime Management Suite*:

1. Start *OnTime Management Suite*
2. From the **Help** tab in the ribbon, choose **Troubleshoot Network Problems**
3. On the resulting window, click the **Start Test** button. It may take a few minutes to complete.

From *OnTime Dispatch*:

1. Start *OnTime Dispatch*
2. From the **Help** tab in the ribbon, choose **Troubleshoot Network Problems**
3. On the resulting window, click the **Start Test** button. It may take a few minutes to complete.